

October 22, 2009

Ladies and Gentlemen:

As Texas Comptroller of Public Accounts, I am dedicated to maintaining our state's resilient economic climate. As part of this commitment, my office continually studies factors related to local and regional economies.

One result of this work is our *Texas in Focus* series of reports, which provides unique data and analysis of the state's 12 economic regions. We have designed this series to provide state and local decision-makers with tools for guiding and assisting regional economic growth.

I am pleased to announce our latest report release, *Texas in Focus: Alamo Region*, which examines development and issues affecting the 19 counties comprising this region and highlights its challenges and successes.

The economic outlook for the Alamo region is excellent with its educational opportunities, health care sector and vibrant tourism industry ensuring continued growth. The region's employment should rise by 23 percent between 2003 and 2013, despite the current national downturn.

One out of seven San Antonio employees work in the health care and biosciences industry, and the Brooke Army Medical Center's Army Burn Center and Center for the Intrepid will continue to provide trauma care and rehabilitation services to injured military personnel. The University of Texas at San Antonio enrollment has risen by 50.9 percent since fall 2000, and enrollment at the University of Houston-Victoria grew 86.9 percent in that time period, much faster than the statewide enrollment growth of 22.8 percent.

Ongoing strength in health care, education and tourism will maintain the region's economy for the future. I hope you will find this report helpful.

Sincerely,

Susan Combs





Texas in Focus: Alamo Region

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Introduction

With its enormous size, vast array of natural resources and large population, Texas plays a significant role in the nation's economy. Our diverse economy helped buffer Texas from the national recession during most of 2008, making it one of the last states to lose jobs.

As other states began shedding jobs during the last half of 2008, Texas gained jobs. It is important to all Texans that the state continues to grow and to discover new opportunities. The role of state government is to create and foster an environment in which this can happen.

The Texas Comptroller analyzes factors affecting the state's economy and uses this information to prepare its biennial forecast of state revenue. The agency's economists keep their fingers on the pulse of the state, detecting changes as they occur and identifying trends that will affect the state's future.

In January 2008, the Comptroller began a series of reports called *Texas in Focus*. The first report, *A Statewide View of Opportunities*, examined issues affecting the state and its economy as a whole. Other reports in the series examine each of the state's 12 economic regions. Previous volumes looked at the High Plains, South Texas, Upper East Texas, Central Texas and Upper Rio Grande regions, providing detailed data and analysis specific to each.

This seventh report in the series, *Texas in Focus: Alamo Region*, examines issues



The Alamo, San Antonio

PHOTO: iStock



affecting an economic region that includes the Alamo Area Council of Governments and the Golden Crescent Regional Planning Commission. The Alamo region consists of 19 counties in the south-central portion of the state and includes the cities of San Antonio, Seguin, New Braunfels, Kerrville, Fredericksburg and Victoria (**Exhibit 1**).

This report provides information on the forces driving change in the Alamo region, and examines factors that may affect the development of its economy. State leaders, county and city officials, chambers of commerce, economic development corporations and the general public can use this report to stay on top of important issues as they work to keep their local economies thriving. Areas explored in this report include:

Economic Development

The Alamo region's economic outlook remains favorable, with job growth similar to statewide patterns. Both statewide and regional employment growth are expected to accelerate in 2010 following slow growth in 2009. Alamo regional employment should rise by 23 percent between 2003 and 2013, despite the current national downturn.

Employment in educational and health services should lead all industries in growth at 44 percent through 2013; the construction sector is also expected to add jobs each year, with employment rising by 38 percent from 2003 to 2013. The financial sector, trade, transportation and utilities, the leisure and hospitality industry, agriculture, natural resources and mining also should experience job growth over this period.

Demographics

Nearly 88 percent of the region's 2 million residents live in or near San Antonio. Between 2008 and 2013, the region's population should increase by 1.7 percent, along with the growth rate for the state. Three counties in the region were among the nation's 100 fastest growing counties from 2000 to 2008 — Comal (40.5 percent), Kendall (38.5 percent) and Guadalupe (31.6 percent).

The Alamo region is majority Hispanic, at 50.5 percent of the population, followed by Anglos at 40.1 percent and African Americans at 5.9 percent. San Antonio has a relatively young population, with 38 percent of its population under 25, compared to about 32 percent in the region's non-metro counties.

Infrastructure

The Alamo region's roadways account for 16,634 of the state's total lane miles, or 8.6 percent. The region contains two major trade corridors: Interstate Highway 35, between the U.S. and Mexico, and Interstate Highway 10, traveling east to west across eight states. NAFTA-related trade between the U.S. and Mexico makes I-35 a key corridor for north- and south-bound freight traffic.

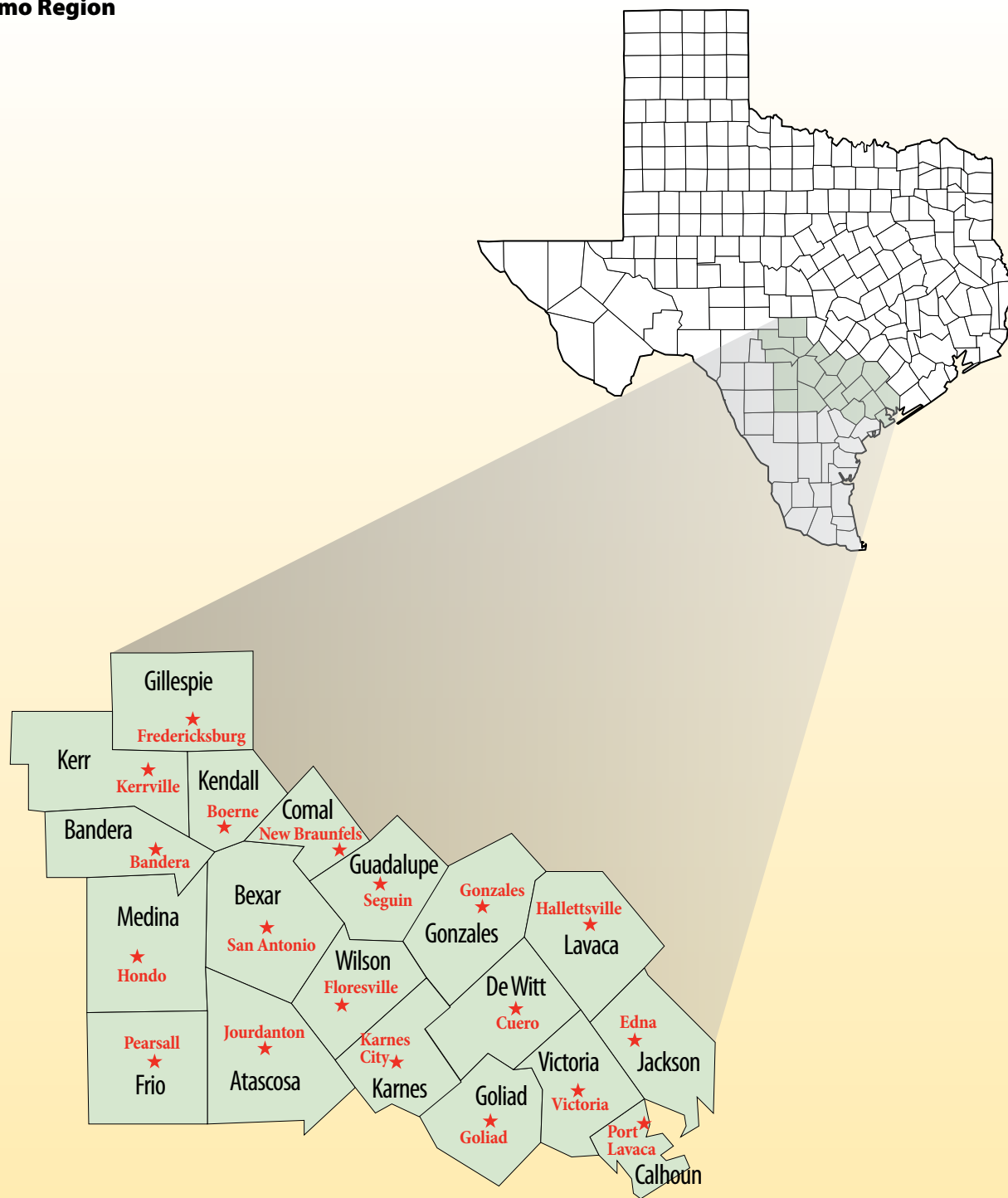
The Alamo region includes several state and national parks and historic sites that showcase its scenic beauty and cultural heritage. In 2008, the region's state parks hosted 691,319 visitors.

Health Care

One out of every seven San Antonio workers is employed in the health care and biosciences industry, with 80 percent of these



Exhibit 1

Alamo Region

Source: Texas Comptroller of Public Accounts.



jobs in the health services sector, including hospitals, medical personnel, nursing homes and other specialty providers.

San Antonio is home to the 900-acre South Texas Medical Center, which employs about 25,000 people. Fort Sam Houston's Brooke Army Medical Center, a 1.5 million-square-foot, 450-bed health care facility, provides care to injured military personnel. It also operates the Army Burn Center and the Center for the Intrepid, a rehabilitation facility for severely injured military personnel.

Education

About 9.4 percent or more than 435,000 of Texas' public elementary and secondary students attend school in the Alamo region. Its school districts vary in size from the Northside ISD in Bexar County, with almost 86,000 students, to the Guardian Angel Performance Arts Academy, also in Bexar County, with just seven students.

The region has seen a slight increase in its number of economically disadvantaged students, from 56 percent in 2001 to 57.3 percent in 2008. Yet 86.2 percent of its campuses are rated Academically Acceptable or better.

In fall 2008, 108,057 students were enrolled in the Alamo region's 16 institutions of higher education. Enrollment in four-year universities and colleges accounted for 45.7 percent of the total. Another 51.5 percent were enrolled in the region's community colleges, while the remaining 2.8 percent attended the University of Texas Health Science Center at San Antonio.

University of Texas at San Antonio enrollment has risen by 50.9 percent since fall 2000, while enrollment at the University of Houston-Victoria rose by 86.9 percent in that period, both much faster than the statewide enrollment growth of 22.8 percent.



Economic Development

Alamo region landscapes range from ports and beaches along the flat eastern coastline to Hill Country brush and cedars in the west. Commerce in each landscape is centered on a metropolitan area, with San Antonio in the west and Victoria in the east. Traditionally, the San Antonio area has benefited from a large military presence, while the coastal area surrounding Victoria has supported manufacturing largely related to petroleum.

Today, the San Antonio economy relies on a strong health services sector that includes

a University of Texas Health Science Center and a number of leading hospitals. Army medical centers and other military facilities in the area contribute to the city's health care industry cluster as well.

Although the region's manufacturing industry is not expected to grow significantly, the sector maintains a large economic share throughout the region, particularly in Victoria. Businesses that manufacture metals, chemicals and plastic products are concentrated near Victoria, attracted by ports and easy access to raw materials.

Construction in the Alamo region should follow state economic trends, with strong growth expected to resume as the economy recovers.

As with the rest of the state, the region's future growth will depend less on its



Caterpillar engine plant ground breaking ceremony, Seguin

PHOTO: Seguin Gazette-Enterprise



Job growth should remain strong in the region's non-metro counties, with positive growth in each year through 2013 despite the recent recession.

traditional goods-producing industries and more on service jobs, such as health care, and professional and business services.

Exhibit 2 shows employment projections for the Alamo region through 2013, including San Antonio and Victoria, the region's two metropolitan statistical areas (MSAs), as well as its eight predominately rural counties. These projections are presented in the form of growth indices relative to the base year of 2003, in which values are equal to 100 for that year.

The region has experienced job growth similar to that of the state as a whole. The Comptroller expects regional employment growth to accelerate in 2010 following slow growth in 2009. Employment in the San Antonio MSA should see a similar pattern,

dropping slightly in 2009 and resuming growth in 2010. Job growth should remain strong in the region's non-metro counties, with positive growth in each year through 2013 despite the recent recession.

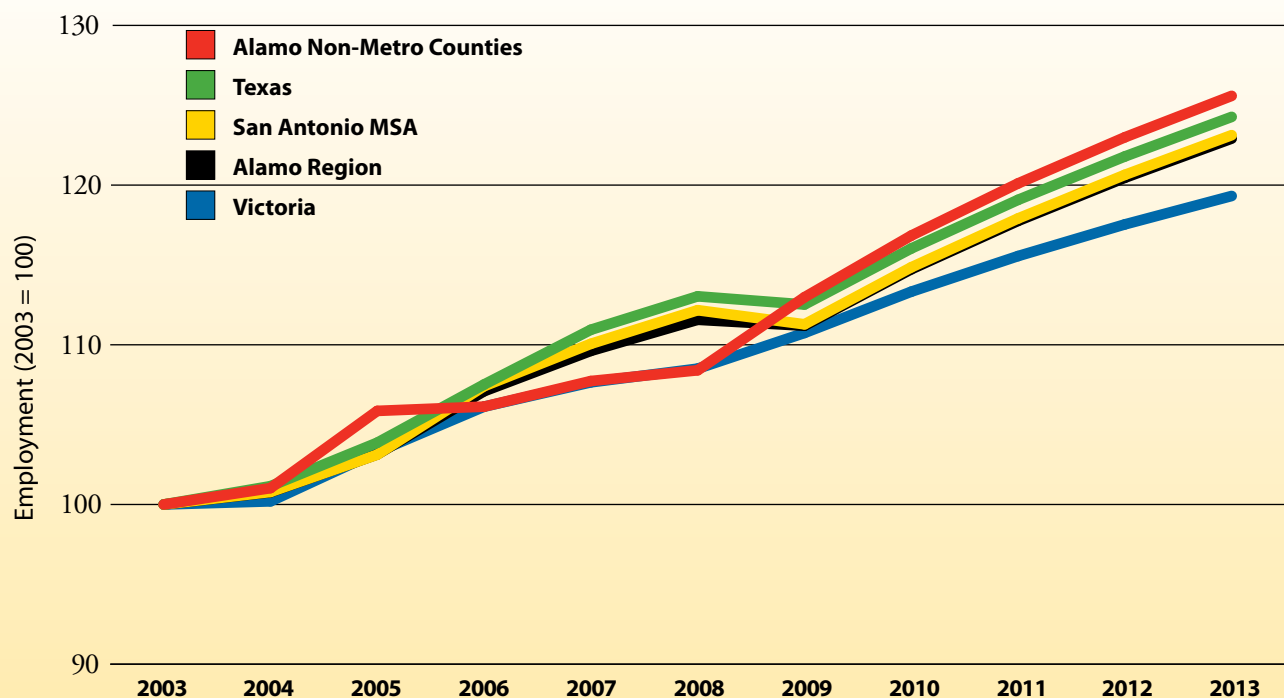
Economic Trends

In 2008, Alamo region employers provided a total of 995,474 jobs. **Exhibit 3** provides a detailed picture of projected employment growth in the region, displaying growth indices for various industries in the region, using 2003 as the base year. Employment for these industries is presented at the 11-industry "supersector" level of the North American Industry Classification System (NAICS).¹

(text continued on Page 8)

Exhibit 2

Alamo Region Employment Indices, 2003-2013



Source: Economic Modeling Specialists Inc.



H-E-B

The H.E. Butt Grocery Company (H-E-B) began in 1905 as the tiny C.C. Butt family shop in Kerrville. Today, this business has grown to more than 300 stores in Texas and Mexico with almost 70,000 employees and more than \$15 billion in annual sales.

Headquartered in San Antonio, H-E-B is the Alamo city's largest private employer, with about 23,000 employees. For many, it is the best place to buy fresh vegetables and meats, dry goods, prescriptions, photo developing, cell phones, fresh cut flowers, live plants, school supplies, concert tickets, gasoline and thousands of other items for daily use.²

H-E-B is Texas' largest privately held company and America's 13th-largest. In 1921, H-E-B began the then-innovative practice of cash and carry, in which customers bought discounted groceries for cash at the time of purchase rather than receiving a monthly bill, and took home their groceries rather than having them delivered. The company thrived during the Great Depression, opening its own bakery and purchasing a canning business.

In the 1940s, H-E-B began stocking frozen foods, a novelty at the time, in its first air-conditioned stores. Today, the company operates the state's largest bread bakery and milk processing plant. In 1997, H-E-B entered the market in Mexico and now operates 30 supermarkets in five Mexican states.

In 2002, H-E-B opened its Quality Assurance Laboratory, making it the only U.S. retailer to perform extensive testing of its beef and produce. The next year, H-E-B opened a new \$4 million transportation terminal in Weslaco and in 2007 added a new 400,000-square-foot warehouse.³

H-E-B has established facilities to seamlessly manufacture, warehouse and transport products to its hundreds of stores. The company's trucks travel an average of 57 million miles annually, with an average of 12,000 deliveries per week. H-E-B has 19 warehouses with about 5 million square feet and moves more than 7 million cases of products to its stores each week.⁴

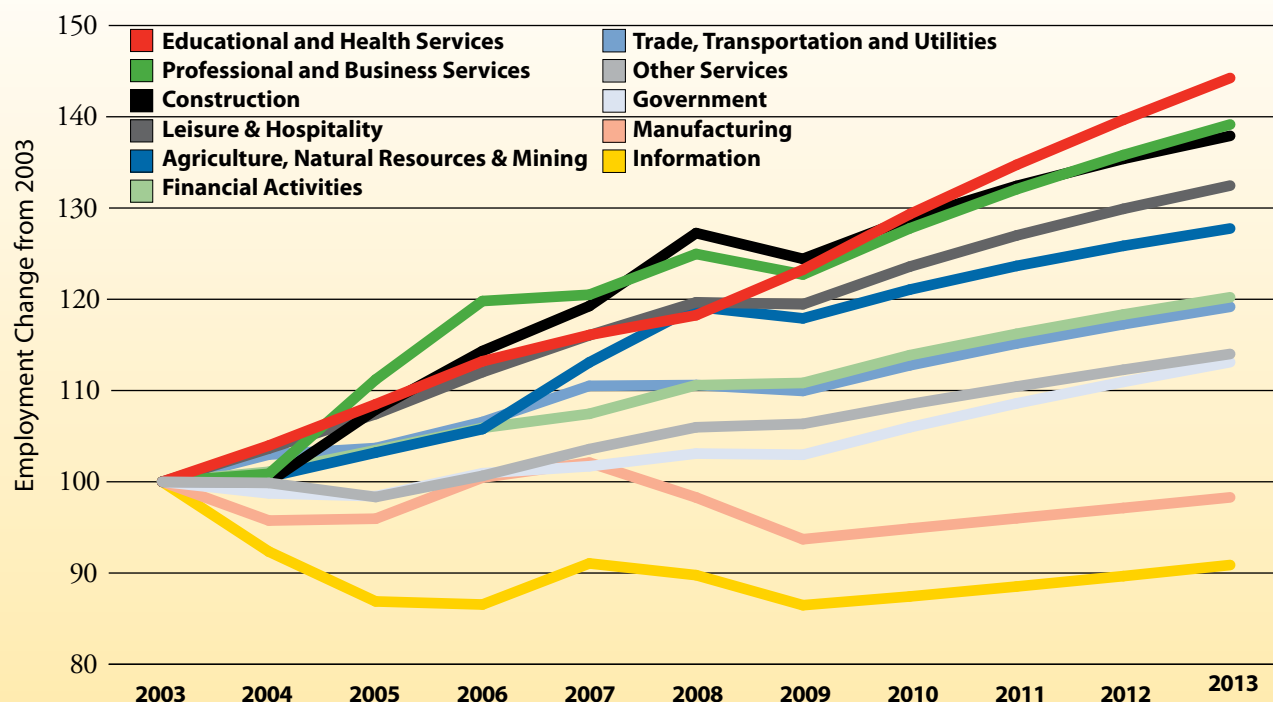
In the 1990s, H-E-B developed its own "university-within-a-company" to train future managers at its H-E-B School of Retail Leadership. About 35 percent of participants enter this school from outside the company, usually from restaurant or military backgrounds. At the end of their training, students volunteer at local food banks and take management sessions with top H-E-B executives. Many H-E-B managers began their careers as stockers, baggers and checkout clerks. The company also has a health and wellness initiative for its employees and customers led by Wane McGarity, a former wide receiver for the UT Longhorns and Dallas Cowboys.⁵

H-E-B has earned a strong reputation as a charitable business. In 1933, Howard E. Butt, Sr., the brother that led the family business, started the H.E. Butt Foundation, a philanthropic organization founded to help local communities. By 1991, the H.E. Butt Foundation had built swimming pools, tennis courts, libraries, and charitable food banks in communities across Texas. As of 2008, H-E-B's Excellence in Education Awards program had distributed more than \$3 million to 773 educators and 155 schools and districts throughout Texas. The company also has sponsored a charity golf tournament for the last 24 years to help groups that focus on education and children. In 2008, the tournament raised \$4.5 million for nonprofit groups.⁶

The company has a massive internal recycling program for aluminum, steel, plastic, cardboard, oil, tires and computers, diverting more than 200,000 tons of waste from landfills each year. H-E-B also saves 6.2 million gallons of water each year by recycling water from its manufacturing processes. The company uses green building practices with energy-saving equipment, windows, lights and landscaping. H-E-B also uses wind energy to help power 46 stores in Bexar County.⁷



Exhibit 3

Alamo Region Industrial Employment Indices, 2003-2013

Sources: Economic Modeling Specialists Inc. and Texas Comptroller of Public Accounts.

A supersector, as identified by a two-digit NAICS code, represents an aggregation of industries producing related goods and services. At this level, industries are classified into either goods-producing or service-producing supersectors.

The goods-producing group comprises three supersectors — natural resources and mining, construction and manufacturing. The service-producing group comprises eight supersectors including education and health; professional and business services; leisure and hospitality; finance; trade, transportation and utilities; other services; government; and information.

Nine of the 11 supersectors in **Exhibit 3** should show positive growth between 2003 and 2013, with exceptional growth

in education and health services. In all, Alamo region employment should rise by 23 percent over this period, despite the current national downturn.

Of the nine supersectors projected to grow by 2013, three should show steady expansion, adding jobs each year. Employment in the region's educational and health services should lead all industries, rising by 44 percent through 2013, largely due to positive growth in home health care services. Home health care will contribute more jobs to the sector than any other industry, accounting for 20 percent of projected regional job creation by 2013. The next strongest health-related industry in terms of expected growth is physicians' offices, accounting for 14

Employment in the region's educational and health services should lead all industries, rising by 44 percent from 2003 through 2013.



percent of jobs in 2013. Educational industries should see more modest growth.

The region's financial sector also should expand each year, rising from 64,870 jobs in 2003 to 77,984 jobs in 2013, a gain of 20 percent. Commercial banking will account for 30 percent of sector growth, with an expected net increase of 3,878 jobs from 2003 to 2013. With an expected 11,524 jobs, commercial banking will trail only direct property and casualty insurers in total number of financial jobs in 2013. Jobs in portfolio management should more than double over the period, rising from 950 jobs in 2003 to 2,626 jobs in 2013.

Finally, the trade, transportation and utilities sector is expected to add jobs each year, growing 19 percent by 2013, from 162,442 to 193,594 jobs. Jobs at discount department stores represent the largest expected gain, more than doubling from 2,384 jobs in 2003 to 7,668 jobs in 2013. With more than 200 establishments in the region, job growth at supermarkets and grocery stores will remain strong.

The industry leads the sector in expected total employment, with 19,109 jobs by 2013.

Despite various industry downturns during the period, other sectors should show job growth through 2013. Expected growth in the professional and business services sector, at more than 39 percent, trails only that for educational and health services, even with a slowdown in 2009 from the current economic downturn.

Government leads all sectors in employment, with nearly 230,000 jobs projected by 2013, representing nearly one out of five jobs in the region. The military represents nearly 19 percent of these jobs, with an additional 8,500 jobs in the region by 2011 due to the military Base Realignment and Closure (BRAC) program.

Other regional industry sectors anticipating positive job growth during the period include leisure and hospitality (33 percent), agriculture, natural resources and mining (28 percent) and other services (14 percent).⁸

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Expected growth in the professional and business services sector, at more than 39 percent, trails only that for educational and health services, even with a slowdown in 2009 from the current economic downturn.

Formosa Plastics

Formosa Plastics Corporation U.S.A., formed in 1978, is an affiliate of Taiwan-based Formosa Plastics Group (FPG), a global leader in petrochemicals and plastics. Formosa U.S.A. is a vertically integrated supplier of plastic resins and petrochemicals with annual revenues exceeding \$4 billion and more than 2,100 employees operating 18 production units in three chemical manufacturing sites around the nation, including Point Comfort in Calhoun County.⁹

Formosa began operating in Point Comfort in 1983. At that time, the facility had two production units, one for plastic resins and one for petrochemical refining, with about 300 employees. Today, the Formosa site in Point Comfort covers 1,600 acres and has ten production units that produce four different plastic resins and four liquid petrochemical products. The plant has about 1,500 full- and part-time employees and another 200 to 300 contract employees.

Formosa has invested \$2.75 billion in the Point Comfort site and is developing two more production units at the plant, which will bring the company's total investment in the site to more than \$3 billion.

To maximize efficiency and ensure compliance with all environmental and safety standards, Formosa spends about \$80 million on routine and functional maintenance annually. The Point Comfort site paid more than \$110 million in salaries and produced about 10 billion pounds of plastic resin and liquid products in 2008.¹⁰



Agriculture

The Alamo region boasts a strong and growing agriculture industry. Its counties produce a wide range of products, including poultry, beef, fruits, nuts, vegetables and feed crops. The total cash value of the region's agriculture industry exceeded \$1.35 billion in 2007. Between 1997 and 2007, the value of the region's agriculture industry rose by 50.6 percent, with growth accelerating during the second half of the decade.

The region's agricultural production is well balanced between livestock and crops; its 19 counties produced \$543 million worth of crops and \$664 million worth of livestock in 2007. Other agriculture-related activities such as fishing and timber production totaled \$145 million.

All of the counties in the Alamo region contribute to the agriculture industry to some extent. Despite being the most populous county in the region, Bexar County is the region's biggest crops producer due to its nursery and greenhouse production. Gonzales County produces the largest share of the region's livestock, at 39 percent. Livestock and crop specialties vary by county; while poultry is Gonzales County's primary livestock commodity, other counties, such as Atascosa County, specialize in beef production.

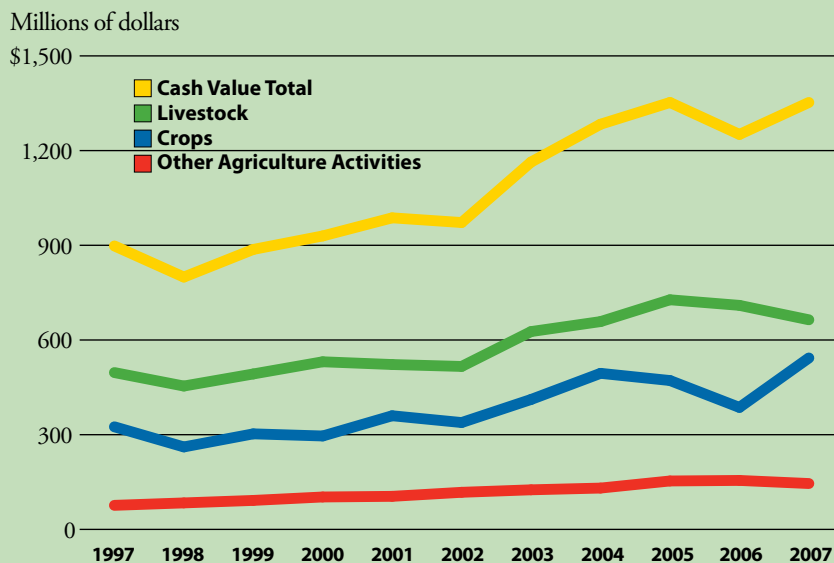
Frio County specializes in peanut cultivation. It produced \$9.5 million worth of peanut crops in 2007, or 75 percent of the total dollar value of peanut production in the region. The county has been cultivating peanuts since 1930, when they were introduced as an alternative to cotton. Peanuts soon became, and still are, the county's most valuable plant crop; of all the county's agricultural products, only beef brings in more revenue, with a cash value of \$16.2 million in 2007.

The region's history with peanuts extends beyond Frio County. The city of Floresville in Wilson County is known for its annual peanut festival, held the second weekend in October.

Pecans also play a role in the region's agricultural heritage. The city of Seguin, located east of San Antonio in Guadalupe County, has been called the pecan capital of Texas. Seguin's pecan cultivation helps to make Guadalupe County one of the top pecan-producing counties in the nation. Between 2004 and 2007, Guadalupe County produced pecan crops averaging \$1.1 million per year in total cash value.

The cities of Fredericksburg and Stonewall, located adjacent to one another in Gillespie County, are known for peach production. Indeed, the city of Stonewall claims it has the "sweetest, juiciest peaches found anywhere in Texas." Numerous orchards are located in and around the two cities, some of which allow visitors to pick their own peaches. Gillespie County is the state's largest peach-producing county, boasting a crop worth \$4.8 million in 2007.

Alamo Region, Agriculture Industry Cash Value



Source: Texas A&M Agrilife Extension Service.



Agriculture (cont.)

The Texas wine industry has been booming for the last several years. The state is the nation's fifth-largest wine producer and the seventh-largest producer of wine grapes. Texas wine-grape production includes several named vineyard areas. The Alamo region includes the Texas Hill Country Viticulture Area and the Bell Mountain Viticulture Area. The Texas Hill Country Viticulture Area is the state's largest, covering about 9 million acres north of San Antonio and west of Austin. The area contains the separately designated Fredericksburg Viticultural Area, comprising 70,400 acres in Gillespie County. Also in Gillespie County is the Bell Mountain Viticulture Area, established in 1986, which covers 3,200 acres. The Guadalupe, Frio, San Antonio and Nueces rivers all originate in this area, providing substantial irrigation for vineyards. In all, the Alamo region has 16 grape-producing counties with 71 vineyards covering 267 acres. Gillespie County alone has 12 vineyards and 184 acres under cultivation, making it the region's leading producer.

Other local businesses also contribute to the Alamo region's agriculture diversity. Promised Land Dairy, for example, is known for producing milk that is free of bovine growth hormone (BGH), a synthesized hormone commonly used to increase cow productivity. The dairy's creamery is located in Floresville in Wilson County, while its corporate offices are in San Antonio. Promised Land offers several varieties of white and flavored milk that can be found at major retailers throughout Texas and in 25 other states.

Patty's Herbs in Pearsall adds to the region's reputation for agricultural bounty. The company's president, Charles Johnson, has been quoted as saying, "We can grow our products outdoors for most of the year," a happy prospect for Patty's many customers. Johnson's mother started selling herbs from her garden in 1981; now occupying 40 acres with greenhouses, this certified organic producer supplies herbs and edible flowers to restaurants in the region and grocery stores across the state (including H-E-B stores).

Wildseed Farms, located seven miles east of Fredericksburg, boasts 200 acres of wildflowers, making it the "world's largest working wildflower farm." The farm sells wildflower seed, trees and shrubs, pottery and gifts, and has an on-site beer garden and live butterfly exhibit. Wildseed Farms receives more than 350,000 visitors per year.¹¹



PHOTO: Texas Department of Agriculture

Peaches in the Fredericksburg area



Economic Structure

Job growth depends upon a region's underlying economic structure. That structure relies on multiple factors including natural resources, labor force characteristics and the composition and *concentration* of the region's industries.

This latter characteristic, also called clustering, is particularly important since industry clusters give firms within them access to more suppliers and a pool of skilled laborers with valuable knowledge and information.¹² The benefits that result from high industry concentrations give a region its competitive edge.¹³

One tool that can be used to identify industry concentration is the "location quotient." The location quotient identifies industry concentrations by comparing the share of a region's economy attributable to a specific industry to the share that same industry accounts for in the nation's economy.

In essence, the share an industry accounts for in the national economy is seen as the "norm" for that industry, so comparing that

norm with its share of a regional economy indicates whether that region tends to have "a lot" or "a little" of a particular industry. Typically, a region will contain "a lot" of industries for which it has some natural or developed competitive advantage, based for instance on a local abundance of a particular resource, a favorable climate, an advantageous natural feature (such as proximity to a port), a highly educated labor force or some other factor.

A location quotient greater than one indicates a high regional employment concentration in an industry compared to the same industry at the national level. This means that the region is "specialized" in that particular industry. A location quotient of less than one indicates that the region's concentration in the industry is less than the national industry level. In essence, the region is *less* specialized in that given industry.

Exhibit 4 lists industries in the Alamo region with location quotients exceeding 2.0 based on 2008 employment, meaning the
(text continued on Page 15)

Exhibit 4

Alamo Region's Largest Industry Location Quotients, 2008

Agriculture, Natural Resources and Mining

NAICS Code	Description	2008 Jobs	2008 Location Quotient
114210	Hunting and trapping	118	8.91
211112	Natural gas liquid extraction	209	5.63
212325	Clay, ceramic, and refractory minerals mining	162	5.23
212324	Kaolin and ball clay mining	77	3.66
212291	Uranium-radium-vanadium ore mining	23	3.09
213112	Support activities for oil and gas operations	3,951	2.49
213111	Drilling oil and gas wells	1,385	2.10
212312	Crushed and broken limestone mining	357	2.08

Construction

NAICS Code	Description	2008 Jobs	2008 Location Quotient
238112	Nonresidential poured foundation contractors	2,311	2.94



Exhibit 4 (cont.)

Alamo Region's Largest Industry Location Quotients, 2008

NAICS Code	Description	2008 Jobs	2008 Location Quotient
237990	Other heavy construction	2,282	2.88
238192	Other nonresidential exterior contractors	688	2.78
236210	Industrial building construction	3,549	2.63

Manufacturing

NAICS Code	Description	2008 Jobs	2008 Location Quotient
331311	Alumina refining	618	38.32
316110	Leather and hide tanning and finishing	356	9.50
339941	Pen and mechanical pencil manufacturing	315	8.48
326111	Plastics bag manufacturing	1,179	5.50
316999	All other leather good manufacturing	187	5.01
311211	Flour milling	459	4.92
325199	All other basic organic chemical manufacturing	1,258	4.92
323116	Manifold business forms printing	1,073	4.85
316991	Luggage manufacturing	118	4.11
327111	Vitreous china plumbing fixture manufacturing	134	3.89
337129	Wood TV, radio, and sewing machine housings	71	3.82
325211	Plastics material and resin manufacturing	1,521	3.53
339111	Laboratory apparatus and furniture manufacturing	309	3.31
334611	Software reproducing	319	3.19
311911	Roasted nuts and peanut butter manufacturing	275	3.17
314121	Curtain and drapery mills	302	3.16
336322	Other motor vehicle electric equipment manufacturing	1,323	3.12
327410	Lime manufacturing	95	2.96
312111	Soft drink manufacturing	1,607	2.83
327310	Cement manufacturing	333	2.66
325181	Alkalies and chlorine manufacturing	152	2.55
339911	Jewelry, except costume, manufacturing	446	2.49
311813	Frozen cakes and other pastries manufacturing	199	2.48
333311	Automatic vending machine manufacturing	77	2.41
311812	Commercial bakeries	2,245	2.41
332618	Other fabricated wire product manufacturing	620	2.34
323118	Blankbook and looseleaf binder manufacturing	137	2.32
327390	Other concrete product manufacturing	1,004	2.22
336111	Automobile manufacturing	1,837	2.13
326113	Nonpackaging plastics film and sheet manufacturing	695	2.10
311830	Tortilla manufacturing	269	2.08
325320	Pesticide and other agricultural chemical manufacturing	219	2.06
337920	Blind and shade manufacturing	268	2.04



Exhibit 4 (cont.)

Alamo Region's Largest Industry Location Quotients, 2008**Trade, Transportation and Utilities**

NAICS Code	Description	2008 Jobs	2008 Location Quotient
483212	Inland water passenger transportation	150	5.04
454111	Electronic shopping	2,307	3.91
488190	Other support activities for air transportation	2,495	3.53
486210	Pipeline transportation of natural gas	636	3.38
424520	Livestock merchant wholesalers	482	3.31
423740	Refrigeration equipment merchant wholesalers	300	2.98
485210	Interurban and rural bus transportation	377	2.77
423730	HVAC equipment merchant wholesalers	1,140	2.59
441229	All other motor vehicle dealers	247	2.18
424430	Dairy product merchant wholesalers	629	2.17
424810	Beer and ale merchant wholesalers	1,435	2.10
448110	Men's clothing stores	1,021	2.03

Information

NAICS Code	Description	2008 Jobs	2008 Location Quotient
519190	All other information services	968	11.85
518210	Data processing and related services	5,240	2.77
515112	Radio stations	1,242	2.08

Financial Activities

NAICS Code	Description	2008 Jobs	2008 Location Quotient
525910	Open-end investment funds	758	4.32
523910	Miscellaneous intermediation	764	4.15
524126	Direct property and casualty insurers	12,862	3.65
522120	Savings institutions	5,471	3.61
522291	Consumer lending	2,207	2.70
532111	Passenger car rental	2,276	2.51
525190	Other insurance funds	363	2.48
532292	Recreational goods rental	154	2.07
522210	Credit card issuing	1,610	2.04

Professional and Business Services

NAICS Code	Description	2008 Jobs	2008 Location Quotient
561422	Telemarketing bureaus	9,117	3.34
561790	Other services to buildings and dwellings	1,435	2.47
561210	Facilities support services	2,046	2.08

Educational and Health Services

NAICS Code	Description	2008 Jobs	2008 Location Quotient
611410	Business and secretarial schools	427	4.39



Exhibit 4 (cont.)

Alamo Region's Largest Industry Location Quotients, 2008

NAICS Code	Description	2008 Jobs	2008 Location Quotient
611512	Flight training	485	3.75
621610	Home health care services	18,952	2.76

Leisure and Hospitality

NAICS Code	Description	2008 Jobs	2008 Location Quotient
712190	Nature parks and other similar institutions	131	2.27
713110	Amusement and theme parks	3,926	3.46

Government

NAICS Code	Description	2008 Jobs	2008 Location Quotient
912000	Federal government, military	36,021	2.44

Source: Economic Modeling Specialists Inc.

region's share of employment in an industry is at least twice as large as the nation's share. These industries are grouped according to their respective NAICS supersectors and ranked from the highest to lowest location quotient within each supersector.¹⁴

The Alamo region has a high concentration of manufacturing, led by alumina refining. The alumina refining industry is concentrated in Victoria MSA and has a location quotient of 38.32, meaning the industry's level of employment in the Alamo region is more than 38 times larger than the nation's share. The next highest location quotient is in all "other information services," which is mostly located in the San Antonio MSA and includes occupations in library services, news syndicates, and internet publishing.

Most Competitive Industries

While location quotients provide important information on regional industry concentrations, they offer only a snapshot — a static measure at a particular point in time. To assess

the competitive resilience of a regional industry, a more dynamic measure is needed. One such measure is "shift-share analysis."

In this analysis, the change in an industry's regional presence is divided into three components: the portion attributable to the overall growth or decline in the nation's economy (the national growth effect); that attributable to the

AT&T

AT&T San Antonio, part of the nation's largest telecommunications company, plays a significant role in the Alamo region's economy. San Antonio was home to AT&T headquarters until summer 2008, when management moved the facility to Dallas. Though a number of jobs left San Antonio during the headquarters move, AT&T remains the area's third-largest private sector employer, with more than 5,000 employees. Only H-E-B and United Services Automobile Association (USAA) employ more people in San Antonio.

In addition to employing thousands of San Antonians, AT&T has made major donations to local causes. For example, AT&T recently donated \$5 million to Haven for Hope, an organization that builds housing for the homeless. In July 2008, the company gave \$1 million to Boy Scouts of America to fund a leadership development center. Since 1993, the company has donated \$109 million to various local causes.¹⁵



San Antonio's Toyota Plant

In 2003, Toyota announced that San Antonio would be the location for its latest vehicle assembly plant in North America. Toyota invested \$1.3 billion to build the facility.

Built on 2,000 acres, the plant was designed exclusively to produce the Tundra pickup line. Production began in 2007, and the plant currently employs some 2,000 people, producing about 200,000 Tundras a year. The plant is one of six in North America.

The San Antonio plant is unique in that it incorporates a number of new Toyota-specific proprietary production techniques and capabilities, and features 21 parts and component suppliers based on site. In 2008, it temporarily closed for three months, mainly due to poor sales projections resulting from the national economic downturn and rising fuel costs. Tundra sales fell precipitously in 2008.

In August of 2009 Toyota announced that it is moving its Tacoma truck line production from Northern California to the San Antonio facility. The move will bring the facility back up to the production capacity it maintained prior to the 2008 temporary closing and could boost employment by 1,100.¹⁶

to the region's competitiveness as a site for the industry (the regional competitiveness effect).

Exhibit 5 lists the Alamo region's most competitive industries based on shift-share analysis. The industries are ranked based on their employment change in the regional competitiveness component (and thus the industry's comparative advantage in the region) between 2003 and 2008.

The Alamo region has a diverse list of competitive industries, with eight different industries occupying the top ten. The two highest-ranked industries are in food services. Local factors (from the competitiveness effect) contributed around 45 percent of job growth for these two industries between 2003 and 2008. The remaining growth was due to a growing national economy during the period, and the fact that industry growth was outpacing overall national growth. Industries with favorable local conditions (such as an extensive infrastructure or favorable government policies)

difference between the national trend for an industry and the national trend for all industries (the industry mix effect); and that attributable

(text continued on Page 19)

Exhibit 5

Alamo Region, Most Competitive Industries, 2003-2008

Description	Supersector	National Growth Effect	Industry Mix Effect	Regional Competitive Effect	Job Change
Limited-service eating places	Leisure and Hospitality	1,668	3,039	3,847	8,554
Full-service restaurants	Leisure and Hospitality	1,645	2,479	3,161	7,285
Local government	Government	6,144	(110)	2,929	8,963
Department stores	Trade, Transportation and Utilities	431	(817)	2,535	2,149
Residential building construction	Construction	200	(195)	2,499	2,504
Office administrative services	Professional and Business Services	96	457	2,309	2,862
Offices of physicians	Educational and Health Services	794	1,209	2,211	4,214



Exhibit 5 (cont.)

Alamo Region, Most Competitive Industries, 2003-2008

Description	Supersector	National Growth Effect	Industry Mix Effect	Regional Competitive Effect	Job Change
Telephone call centers	Professional and Business Services	379	648	2,177	3,204
Automobile and light truck manufacturing	Manufacturing	2	(14)	1,962	1,950
Commercial banking	Financial Activities	411	(6)	1,919	2,324
Management of companies and enterprises	Professional and Business Services	305	259	1,762	2,326
Insurance agencies and brokerages	Financial Activities	213	42	1,620	1,875
Janitorial services	Professional and Business Services	258	346	1,513	2,117
Supermarkets and other grocery stores	Trade, Transportation and Utilities	798	(412)	1,444	1,830
Nursing care facilities	Educational and Health Services	583	(334)	1,399	1,648
Hotels and motels, except casino hotels	Leisure and Hospitality	639	(57)	1,350	1,932
Direct insurers, except life and health	Professional and Business Services	682	(1,409)	1,295	568
Appliance, TV, and other electronics stores	Trade, Transportation and Utilities	110	214	1,273	1,597
Engineering services	Professional and Business Services	232	764	1,265	2,261
Motor vehicle seating and interior trim mfg.	Manufacturing	2	(6)	1,197	1,193
Television broadcasting	Information	26	(26)	1,172	1,172
Other heavy construction	Construction	55	(41)	1,042	1,056
Home centers	Trade, Transportation and Utilities	207	365	997	1,569
New car dealers	Trade, Transportation and Utilities	472	(1,058)	964	378
Federal government, civilian, except postal service	Government	1,361	(589)	955	1,727
Drywall and insulation contractors	Construction	85	(88)	907	904
All other general merchandise stores	Trade, Transportation and Utilities	88	(63)	899	924
Highway, street, and bridge construction	Construction	151	(350)	881	682



Exhibit 5 (cont.)

Alamo Region, Most Competitive Industries, 2003-2008

Description	Supersector	National Growth Effect	Industry Mix Effect	Regional Competitive Effect	Job Change
Elementary and secondary schools	Educational and Health Services	106	276	879	1,261
Other services to buildings and dwellings	Professional and Business Services	34	14	866	914
Savings institutions	Financial Activities	286	(928)	863	221
Poured concrete structure contractors	Construction	123	105	857	1,085
Bread and bakery product manufacturing	Manufacturing	105	(188)	847	764
Management consulting services	Professional and Business Services	134	596	826	1,556
Other support activities for air transport.	Trade, Transportation and Utilities	67	360	801	1,228
Data processing and related services	Information	231	(476)	783	538
Pharmacies and drug stores	Trade, Transportation and Utilities	166	85	776	1,027
General medical and surgical hospitals	Educational and Health Services	1,093	676	762	2,531
Offices of dentists	Educational and Health Services	229	235	656	1,120
Oil and gas extraction	Agriculture, Natural Resources and Mining	51	271	607	929
Employment placement agencies	Professional and Business Services	89	163	584	836
Men's clothing stores	Trade, Transportation and Utilities	26	(46)	577	557
Automotive body, interior, and glass repair	Other Services	110	(164)	551	497
Plate work and fabricated structural products	Manufacturing	72	119	535	726
Drinking places, alcoholic beverages	Leisure and Hospitality	164	(352)	521	333
Offices of real estate agents and brokers	Financial Activities	74	57	498	629
General line grocery merchant wholesalers	Trade, Transportation and Utilities	88	32	498	618
Security and armored car services	Professional and Business Services	189	237	481	907
Motor vehicle body and trailer manufacturing	Manufacturing	9	(13)	471	467
Other residential care facilities	Educational and Health Services	78	(46)	459	491

Source: Economic Modeling Specialists Inc.



combined with a growing national industry have the highest potential for future growth.

Exhibit 6 lists the five most competitive industries in the San Antonio MSA, Victoria MSA and non-metro counties.

Good Jobs for the Future

Shift-share analysis identifies the region's most competitive industries — those that possess the best chances for increased employment opportunities. But what types

Exhibit 6

Alamo Region, Five Most Competitive Industries by Area

San Antonio MSA

Description	Supersector Industry	National Growth Effect	Industry Mix Effect	Regional Competitive Effect	Total Jobs Added Since 2003
Local government	Government	5,220	(94)	4,161	9,287
Limited-service eating places	Leisure and Hospitality	1,488	2,711	3,554	7,753
Full-service restaurants	Leisure and Hospitality	1,475	2,222	2,945	6,642
Offices of physicians	Educational and Health Services	696	1,060	2,387	4,143
Residential building construction	Construction	167	(163)	2,292	2,296

Victoria MSA

Description	Supersector Industry	National Growth Effect	Industry Mix Effect	Regional Competitive Effect	Total Jobs Added Since 2003
All other chemical preparation manufacturing	Manufacturing	0	(2)	345	343
Department stores	Trade, Transportation and Utilities	28	(52)	337	313
Temporary help services	Professional and Business Services	15	14	292	321
Fertilizer manufacturing	Manufacturing	0	(0)	290	290
Plastics packaging materials, film and sheet	Manufacturing	16	(26)	271	261

Non-Metro Counties

Description	Supersector Industry	National Growth Effect	Industry Mix Effect	Regional Competitive Effect	Total Jobs Added Since 2003
Department stores	Trade, Transportation and Utilities	1	(1)	890	890
Limited-service eating places	Leisure and Hospitality	80	145	398	623
Residential building construction	Construction	23	(22)	284	285
Plate work and fabricated structural products	Manufacturing	12	21	264	297
Broadwoven fabric mills	Manufacturing	15	(166)	213	62

Source: Economic Modeling Specialists Inc.



of occupations can Alamo residents expect to find within these industries? **Exhibit 7** presents a list of “good jobs” for the region’s

future, grouping them based on their educational requirements.

(text continued on Page 29)

Caterpillar Tractor Company

In an effort to bring new jobs and revenue to south central Texas, Governor Rick Perry awarded Caterpillar Inc. a \$10 million grant from the Texas Enterprise Fund. This grant is for the construction of an engine manufacturing plant in Seguin begun in January 2009.

Established in 1925, the Caterpillar Tractor Company was the result of a merger between Holt Manufacturing Company and the C. L. Best Tractor Company. The owners of these companies, Benjamin Holt and Daniel Best, had developed different types of steam tractors for farming since 1890. Today, Caterpillar is one of the leading producers of heavy equipment and offers more than 300 machines in its product line.

Located along Interstate 10 at Texas 46, Caterpillar’s \$169.7 million engine plant in Seguin will employ an estimated 1,400 people when completed in 2011. In addition to the grant from the Texas Enterprise Fund, Caterpillar will receive city and county incentives totaling \$11 million over the next ten years.¹⁷

Exhibit 7

Alamo Region, “Good Jobs,” 2008-2013

Doctoral and First Professional Degrees

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Physicians and surgeons	6,286	7,357	1,071	1,668	2,739	\$128,253
Pharmacists	2,186	2,630	444	640	1,084	107,667
Dentists, general	671	785	114	183	297	101,444
Orthodontists	148	178	30	46	76	89,281
Physicists	81	93	12	23	35	88,612
Oral and maxillofacial surgeons	122	148	26	39	65	81,560
Biochemists and biophysicists	49	58	9	14	23	75,756
Veterinarians	548	732	184	246	430	71,347
Dentists, all other specialists	129	153	24	38	62	70,673
Medical scientists, except epidemiologists	363	441	78	139	217	70,513
Postsecondary teachers	11,851	14,352	2,501	3,528	6,029	68,452
Lawyers	5,747	6,487	740	1,314	2,054	66,118
Podiatrists	321	371	50	107	157	65,582
Astronomers	30	34	4	8	12	65,483
Mathematicians	11	12	1	2	3	62,934
Computer and information scientists, research	549	643	94	172	266	62,307
Optometrists	299	350	51	78	129	58,232



Exhibit 7 (cont.)

Alamo Region, "Good Jobs," 2008-2013

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Microbiologists	91	105	14	24	38	54,881
Audiologists	112	133	21	28	49	51,016
Chiropractors	262	318	56	71	127	50,937
Prosthodontists	89	109	20	30	50	48,812
Clinical, counseling, and school psychologists	1,246	1,439	193	292	485	48,567
Total	31,190	36,927	5,737	8,691	14,428	
Weighted Average of Median Annual Earnings						\$82,490

Master's Degrees

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Geoscientists, except hydrologists and geographers	431	507	76	133	209	\$96,604
Social scientists and related workers, all other	299	332	33	83	116	74,896
Hydrologists	200	231	31	57	88	71,866
Physical therapists	1,251	1,572	321	400	721	70,595
Statisticians	100	111	11	27	38	65,792
Operations research analysts	254	272	18	44	62	63,789
Economists	79	88	9	21	30	62,627
Environmental scientists and specialists, including health	444	514	70	129	199	61,152
Occupational therapists	966	1,187	221	295	516	60,956
Speech-language pathologists	1,409	1,637	228	367	595	55,210
Instructional coordinators	1,593	1,945	352	465	817	51,222
Psychologists, all other	634	746	112	164	276	50,695
Educational, vocational, and school counselors	1,989	2,295	306	506	812	49,164
Librarians	1,011	1,145	134	271	405	47,897
Mathematical scientists, all other	19	23	4	7	11	46,071
Urban and regional planners	202	233	31	61	92	45,290
Counselors, all other	423	491	68	111	179	44,559
Curators	50	55	5	16	21	41,994
Epidemiologists	32	38	6	11	17	41,939
Industrial-organizational psychologists	525	631	106	150	256	41,707
Total	11,911	14,052	2,142	3,318	5,460	
Weighted Average of Median Annual Earnings						\$56,454



Exhibit 7 (cont.)

Alamo Region, "Good Jobs," 2008-2013

Degree Plus Work Experience

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Chief executives	9,312	10,741	1,429	2,690	4,119	\$149,227
Engineering managers	748	831	83	160	243	102,344
Computer and information systems managers	1,326	1,488	162	271	433	90,477
Purchasing managers	316	344	28	74	102	87,740
Natural sciences managers	117	134	17	31	48	86,818
Education administrators, elementary and secondary school	2,224	2,534	310	622	932	80,838
Compensation and benefits managers	318	358	40	70	110	77,461
Human resources managers, all other	258	290	32	56	88	75,459
General and operations managers	14,782	15,800	1,018	2,786	3,804	74,370
Actuaries	69	74	5	18	23	70,067
Judges, magistrate judges, and magistrates	218	249	31	52	83	69,688
Administrative services managers	1,933	2,141	208	465	673	69,442
Financial managers	3,761	4,282	521	798	1,319	68,326
Marketing managers	1,115	1,255	140	266	406	68,187
Sales managers	1,955	2,141	186	402	588	67,716
Medical and health services managers	2,236	2,624	388	603	991	67,006
Training and development managers	188	214	26	44	70	64,320
Public relations managers	290	329	39	74	113	61,338
Advertising and promotions managers	285	304	19	52	71	60,360
Vocational education teachers, secondary school	1,129	1,211	82	275	357	47,327
Administrative law judges, adjudicators, and hearing officers	31	35	4	7	11	46,016
Education administrators, postsecondary	805	956	151	267	418	45,055
Management analysts	6,201	6,915	714	1,266	1,980	42,358
Total	49,617	55,247	5,633	11,349	16,982	
Weighted Average of Median Annual Earnings						\$82,986

Bachelor's Degrees

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Airline pilots, copilots, and flight engineers	235	206	-29	4	-25	\$115,308
Materials engineers	146	164	18	35	53	95,651



Exhibit 7 (cont.)

Alamo Region, "Good Jobs," 2008-2013

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Petroleum engineers	332	400	68	112	180	91,028
Physician assistants	335	414	79	103	182	84,738
Sales engineers	262	286	24	58	82	79,397
Engineers, all other	1,270	1,396	126	202	328	79,213
Life scientists, all other	65	76	11	22	33	78,390
Electronics engineers, except computer	818	886	68	165	233	77,318
Computer hardware engineers	148	172	24	48	72	77,216
Chemical engineers	250	272	22	55	77	76,992
Aerospace engineers	406	406	0	37	37	74,380
Mining and geological engineers, including mining safety engineers	162	190	28	46	74	73,754
Electrical engineers	641	722	81	158	239	73,555
Industrial engineers	649	784	135	215	350	71,951
Materials scientists	50	59	9	16	25	71,695
Environmental engineers	269	315	46	87	133	69,614
Health and safety engineers, except mining safety engineers and inspectors	151	166	15	33	48	67,134
Computer software engineers, applications	3,020	3,725	705	935	1,640	65,846
Computer software engineers, systems software	1,684	1,972	288	415	703	65,081
Budget analysts	553	604	51	116	167	60,829
Chemists	387	422	35	87	122	60,791
Mechanical engineers	751	837	86	168	254	59,723
Computer systems analysts	3,430	4,054	624	1,094	1,718	59,579
Civil engineers	2,841	3,235	394	774	1,168	58,991
Business operation specialists, all other	7,133	8,241	1,108	1,500	2,608	58,440
Computer programmers	2,384	2,490	106	408	514	58,311
Database administrators	909	1,063	154	204	358	57,486
Marine engineers and naval architects	18	21	3	6	9	56,324
Occupational health and safety specialists	414	459	45	85	130	55,910
Human resources, training, and labor relations specialists, all other	1,628	1,858	230	408	638	55,859
Loan officers	1,597	1,732	135	222	357	54,828
Financial examiners	303	348	45	73	118	54,667
Market research analysts	1,617	1,814	197	254	451	53,444
Architects, except landscape and naval	1,083	1,240	157	262	419	50,504
Network systems and data communications analysts	1,487	1,852	365	524	889	50,483



Exhibit 7 (cont.)

Alamo Region, "Good Jobs," 2008-2013

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Credit analysts	312	324	12	72	84	50,196
Network and computer systems administrators	2,366	2,744	378	654	1,032	49,926
Athletic trainers	145	174	29	43	72	49,917
Tax examiners, collectors, and revenue agents	331	370	39	82	121	49,637
Medical and clinical laboratory technologists	1,404	1,625	221	330	551	49,563
Dietitians and nutritionists	524	599	75	143	218	48,601
Secondary school teachers, except special and vocational education	9,273	10,357	1,084	2,459	3,543	48,483
Health diagnosing and treating practitioners, all other	444	520	76	116	192	48,430
Physical scientists, all other	218	247	29	51	80	47,681
Insurance underwriters	866	945	79	196	275	46,826
Technical writers	539	612	73	156	229	46,722
Atmospheric and space scientists	83	89	6	16	22	46,119
Middle school teachers, except special and vocational education	7,516	8,610	1,094	1,916	3,010	46,107
Food scientists and technologists	76	87	11	23	34	46,027
Special education teachers, middle school	679	796	117	193	310	45,942
Special education teachers, preschool, kindergarten, and elementary school	1,623	1,925	302	484	786	45,914
Elementary school teachers, except special education	15,516	17,900	2,384	4,082	6,466	45,413
Compensation, benefits, and job analysis specialists	1,134	1,297	163	287	450	44,561
Biomedical engineers	17	21	4	6	10	44,042
Special education teachers, secondary school	690	782	92	169	261	43,976
Orthotists and prosthetists	133	154	21	27	48	43,883
Public relations specialists	1,974	2,233	259	336	595	43,537
Training and development specialists	1,348	1,526	178	325	503	43,010
Financial specialists, all other	868	902	34	152	186	41,491
Therapists, all other	389	463	74	99	173	40,765
Legal support workers, all other	430	480	50	85	135	39,899
Medical and public health social workers	1,019	1,235	216	327	543	39,672
Graphic designers	1,468	1,680	212	417	629	39,320
Accountants and auditors	10,366	11,247	881	1,770	2,651	38,880
Total	99,180	112,826	13,646	23,948	37,594	



Exhibit 7 (cont.)

Alamo Region, "Good Jobs," 2008-2013

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Weighted Average of Median Annual Earnings						\$51,221

Associate Degrees

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Dental hygienists	1,080	1,370	290	400	690	\$65,756
Computer specialists, all other	1,495	1,693	198	401	599	65,052
Radiation therapists	99	119	20	28	48	60,415
Nuclear medicine technologists	142	162	20	30	50	60,238
Registered nurses	16,599	19,683	3,084	4,484	7,568	58,823
Diagnostic medical sonographers	336	394	58	81	139	58,427
Occupational therapist assistants	244	302	58	77	135	57,397
Physical therapist assistants	445	575	130	160	290	55,534
Electrical and electronic engineering technicians	601	651	50	109	159	50,903
Aerospace engineering and operations technicians	53	50	-3	2	-1	50,534
Chemical technicians	1,018	1,074	56	230	286	49,549
Radiologic technologists and technicians	1,665	1,928	263	379	642	48,480
Engineering technicians, except drafters, all other	673	728	55	121	176	48,216
Cardiovascular technologists and technicians	242	290	48	65	113	48,207
Respiratory therapists	952	1,119	167	238	405	47,023
Mechanical engineering technicians	377	428	51	89	140	46,502
Nuclear technicians	52	61	9	19	28	45,439
Fish and game wardens	21	23	2	5	7	44,615
Industrial engineering technicians	232	258	26	48	74	42,716
Respiratory therapy technicians	238	253	15	51	66	42,362
Computer support specialists	4,132	4,577	445	1,088	1,533	39,614
Electro-mechanical technicians	35	39	4	8	12	38,626
Total	30,731	35,778	5,046	8,112	13,158	
Weighted Average of Median Annual Earnings						\$54,561

Postsecondary Vocational Award

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Commercial pilots	183	198	15	42	57	\$55,069



Exhibit 7 (cont.)

Alamo Region, "Good Jobs," 2008-2013

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Ship engineers	38	45	7	12	19	51,902
Electrical and electronics repairers, powerhouse, substation, and relay	130	146	16	43	59	49,022
Electrical and electronics repairers, commercial and industrial equipment	341	376	35	93	128	45,096
Avionics technicians	292	299	7	21	28	44,116
Court reporters	374	427	53	82	135	43,786
Aircraft mechanics and service technicians	2,509	2,627	118	241	359	42,649
Mechanical drafters	385	418	33	87	120	40,451
Electrical and electronics drafters	241	266	25	60	85	40,430
Total	4,492	4,804	309	681	990	
Weighted Average of Median Annual Earnings						\$43,513

Long-term on-the-job training

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Air traffic controllers	174	195	21	45	66	\$87,695
Elevator installers and repairers	149	157	8	27	35	58,542
Nuclear power reactor operators	12	15	3	5	8	54,013
Numerical tool and process control programmers	84	81	-3	5	2	48,126
Chemical plant and system operators	81	88	7	25	32	48,067
Compliance officers, except agriculture, construction, health and safety, and transportation	1,163	1,270	107	176	283	46,931
Police and sheriff's patrol officers	5,468	6,280	812	1,541	2,353	46,898
Power distributors and dispatchers	57	64	7	19	26	46,752
Fire fighters	2,704	3,095	391	882	1,273	46,705
Power plant operators	172	199	27	58	85	45,442
Plant and system operators, all other	44	47	3	10	13	44,390
Boilermakers	86	94	8	23	31	42,696
Airfield operations specialists	67	73	6	15	21	42,551
Gas plant operators	156	200	44	77	121	42,540
Claims adjusters, examiners, and investigators	3,705	4,012	307	783	1,090	41,989
Telecommunications equipment installers and repairers, except line installers	1,355	1,347	-8	154	146	41,517



Exhibit 7 (cont.)

Alamo Region, "Good Jobs," 2008-2013

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Transit and railroad police	23	26	3	6	9	40,755
Military Occupations	36,951	42,475	5,524	2,961	8,485	40,212
Flight attendants	355	202	-153	-126	-279	39,608
Stationary engineers and boiler operators	266	290	24	47	71	39,295
Crane and tower operators	249	269	20	41	61	39,006
Total	53,322	60,476	7,158	6,773	13,931	
Weighted Average of Median Annual Earnings						\$41,791

Moderate-term on-the-job training

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Sales representatives, wholesale and manufacturing, technical and scientific products	2,759	3,024	265	570	835	\$53,300
Media and communication equipment workers, all other	141	154	13	31	44	52,895
Gas compressor and gas pumping station operators	470	547	77	210	287	51,224
Wellhead pumpers	636	735	99	262	361	48,701
Rotary drill operators, oil and gas	426	469	43	75	118	48,438
Statistical assistants	143	160	17	49	66	46,131
Continuous mining machine operators	19	21	2	5	7	45,206
Chemical equipment operators and tenders	330	335	5	49	54	45,071
Mine cutting and channeling machine operators	17	19	2	5	7	44,851
Sales representatives, wholesale and manufacturing, except technical and scientific products	9,752	10,571	819	1,888	2,707	44,696
Locomotive engineers and operators	288	303	15	64	79	44,349
Railroad conductors and yardmasters	167	181	14	46	60	43,843
Pump operators, except wellhead pumpers	491	568	77	203	280	43,834
Derrick operators, oil and gas	414	455	41	73	114	43,234
Advertising sales agents	1,053	1,192	139	234	373	43,134
Mining machine operators, all other	17	19	2	5	7	42,877
Bookbinders	31	31	0	5	5	42,265
Cargo and freight agents	513	541	28	96	124	42,205



Exhibit 7 (cont.)

Alamo Region, "Good Jobs," 2008-2013

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Rock splitters, quarry	180	207	27	49	76	41,171
Roof bolters, mining	150	174	24	46	70	40,851
Timing device assemblers, adjusters, and calibrators	68	73	5	14	19	40,310
Brokerage clerks	289	305	16	63	79	39,891
Precision instrument and equipment repairers, all other	312	344	32	76	108	39,597
Extraction workers, all other	204	232	28	53	81	39,039
Total	18,869	20,661	1,790	4,172	5,962	
Weighted Average of Median Annual Earnings						\$45,888

Short-term on-the-job training

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Postal service clerks	366	377	11	51	62	\$56,683
Postal service mail sorters, processors, and processing machine operators	1,046	1,028	-18	78	60	50,940
Postal service mail carriers	1,965	2,023	58	337	395	48,600
Helpers, extraction workers	389	439	50	107	157	45,368
Total	3,766	3,868	101	572	673	
Weighted Average of Median Annual Earnings						\$49,643

Work experience in a related field

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Industrial production managers	660	688	28	158	186	\$85,639
Transportation, storage, and distribution managers	626	690	64	156	220	67,838
First-line supervisors/managers of police and detectives	200	226	26	57	83	62,861
First-line supervisors/managers of fire fighting and prevention workers	100	114	14	30	44	61,318
Detectives and criminal investigators	1,242	1,475	233	373	606	59,377
Postmasters and mail superintendents	113	114	1	15	16	58,744
Purchasing agents, except wholesale, retail, and farm products	2,116	2,246	130	356	486	55,460
Transportation inspectors	178	200	22	52	74	50,134



Exhibit 7 (cont.)

Alamo Region, “Good Jobs,” 2008-2013

Occupation	2008 Jobs	2013 Jobs	Growth	Replacement	Total Job Openings	Median 2008 Annual Earnings
Captains, mates, and pilots of water vessels	109	132	23	37	60	48,291
First-line supervisors/managers of mechanics, installers, and repairers	3,555	3,792	237	647	884	47,982
First-line supervisors/managers of transportation and material-moving machine and vehicle operators	1,547	1,681	134	288	422	46,748
Cost estimators	1,481	1,654	173	322	495	43,665
First-line supervisors/managers of production and operating workers	4,006	4,162	156	575	731	42,513
Wholesale and retail buyers, except farm products	963	1,022	59	167	226	42,140
Fire inspectors and investigators	75	86	11	19	30	39,931
First-line supervisors/managers of helpers, laborers, and material movers, hand	1,378	1,518	140	278	418	39,128
Purchasing agents and buyers, farm products	63	69	6	13	19	39,083
First-line supervisors/managers of office and administrative support workers	11,992	12,944	952	2,181	3,133	38,939
First-line supervisors/managers of construction trades and extraction workers	10,378	11,400	1,022	1,713	2,735	38,876
Total	40,782	44,214	3,431	7,437	10,868	
Weighted Average of Median Annual Earnings						\$43,594

Source: economic Modeling Specialists Inc.

For the purpose of this analysis, a “good job” is one for which median annual earnings, as reported by the Texas Workforce Commission, exceed the state’s 2008 per capita personal income level of \$38,575.¹⁸ In the Alamo region, 228 occupations pay more than this amount.

Occupations requiring both a college degree and work experience command the highest annual earnings, with weighted median earnings

of \$82,986 for the region. Occupations requiring a doctoral or professional degree provide the second-highest earnings, with weighted median earnings of \$82,490. Occupations requiring a master’s degree ranked third, with a weighted median of \$56,454.

Many occupations in the Alamo region requiring an associate degree yield higher earnings than those requiring a bachelor’s degree (without work experience). Associate



degree occupations offer weighted median earnings of \$54,561, while bachelor's degree occupations offer weighted median earnings of \$51,221.

It should be noted that many of the region's occupations that meet the "good jobs" definition do not require a college degree. A number that require related work experience, on-the-job-training or postsecondary vocational training also provide good wages. Jobs requiring short-term, on-the-job training but no postsecondary education provide weighted median earnings of \$49,643. Occupations requiring postsecondary vocational training provide weighted median earnings of \$43,513 annually.

Exhibit 8 lists 25 occupations expected to have the highest number of job openings in the Alamo region between 2008 and 2013. Retail sales top the list, with 15,411 job openings from 2008 to 2013 and median annual earnings of \$19,204.¹⁹

Ten of the 25 occupations require only short-term, on-the-job training. These provide median annual earnings ranging between \$14,502 and \$21,753. Three occupations require a bachelor's degree, including elementary school teachers, property managers and chief executives. One occupation, postsecondary teaching, requires a graduate degree.

Comptroller Assistance

One of the many functions of the Texas Comptroller of Public Accounts is to analyze demographics, labor force statistics and other economic factors needed to generate local economic growth, and to provide this information to local governments and other groups. Through its Texas EDGE (Economic Data for Growth and Expansion) program, the agency can identify occupational and industry trends and their effects on local and regional economies.

(text continued on Page 32)

Albany Engineered Composites

Albany Engineered Composites in Boerne is a subsidiary of Albany International Corporation, a global advanced textiles and materials processing company based in Albany, New York. Founded in 1895, the company employs about 6,100 people worldwide in 14 countries. Its customers include leading aerospace and military equipment manufacturers and contractors.²⁰

Albany's Boerne facility has been in operation since 2001 and primarily develops advanced composite structures and textiles used in airplane and aerospace vehicle manufacturing.

Albany Engineered Composites employs more than 250 people in Kendall County. In March 2009, the company completed an 18-month expansion project that doubled the facility's size, from 45,000 square feet to more than 90,000 square feet. The company plans to add an additional 330 employees in Boerne over the next seven years. It pays out more than \$5 million in annual salaries with an average wage of \$30,000 per employee.²¹

According to the Kendall County Economic Development Corporation, the expansion of the Albany Engineered Composites facility in Boerne was made possible through a \$1 million grant from the state's Texas Enterprise Fund and the coordinated effort of city and county officials, Alamo Community College, the Texas Workforce Commission and the Texas Governor's Office of Economic Development and Tourism. The Albany expansion ranks as the largest capital investment and job creation by a single company in Kendall County's history.²²



Exhibit 8

Alamo Region, Occupations with the Most Projected Job Openings, 2008-2013

Rank	Description	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
1	Retail salespersons	38,467	43,180	15,411	4,713	10,698	\$19,204
2	Customer service representatives	27,570	31,122	10,919	3,552	7,367	23,957
3	Combined food preparation and serving workers, including fast food	28,881	32,899	10,793	4,018	6,775	15,252
4	Waiters and waitresses	19,429	21,845	10,172	2,416	7,756	15,128
5	Personal and home care aides	15,239	19,641	10,162	4,402	5,760	14,903
6	Cashiers, except gaming	26,827	28,440	10,079	1,613	8,466	17,228
7	Military Occupations	36,951	42,475	8,485	5,524	2,961	40,212
8	Real estate sales agents	14,280	17,853	8,281	3,573	4,708	14,715
9	Real estate brokers	13,185	16,630	7,937	3,445	4,492	14,387
10	Registered nurses	16,599	19,683	7,568	3,084	4,484	58,823
11	Elementary school teachers, except special education	15,516	17,900	6,466	2,384	4,082	45,413
12	Office clerks, general	19,853	22,025	6,158	2,172	3,986	21,753
13	Postsecondary teachers	11,851	14,352	6,029	2,501	3,528	68,452
14	Maids and housekeeping cleaners	16,521	18,708	5,906	2,187	3,719	15,633
15	First-line supervisors/managers of retail sales workers	18,736	20,678	5,870	1,942	3,928	28,997
16	Janitors and cleaners, except maids and housekeeping cleaners	16,877	18,843	5,527	1,966	3,561	18,183
17	Managers, all other	13,649	15,670	5,379	2,021	3,358	35,108
18	Property, real estate, and community association managers	9,924	12,250	5,335	2,326	3,009	19,782
19	Child care workers	12,276	14,042	5,286	1,766	3,520	14,502
20	Bookkeeping, accounting, and auditing clerks	15,420	17,030	4,418	1,610	2,808	27,065
21	Home health aides	7,486	9,490	4,361	2,004	2,357	17,292
22	Nursing aides, orderlies, and attendants	11,509	13,341	4,187	1,832	2,355	20,553
23	Chief executives	9,312	10,741	4,119	1,429	2,690	41,776
24	Secretaries, except legal, medical, and executive	20,795	22,021	4,095	1,226	2,869	24,631
25	Executive secretaries and administrative assistants	12,718	14,240	4,060	1,522	2,538	33,385

Source: Economic Modeling Specialists Inc.



SECO is anticipating \$290.2 million in federal funds through the American Recovery and Reinvestment Act to help local governments.

Since August 2008, the Comptroller has responded to 638 Texas EDGE requests from city and county government officials, economic development corporations, private businesses and members of the media. These requests have covered many topics including demographics, economic development, economic modeling and taxes.

The Comptroller also can provide local demographic data, identify business clusters and provide maps of regional roadways and waterways. For assistance, please visit www.window.state.tx.us/texasedge or e-mail texas.edge@cpa.state.tx.us.

The agency also provides local governments with information about tax-related programs and helps them identify opportunities to raise funds for economic development efforts through property, sales and franchise tax revenues, exemptions and credits. The agency also provides information on special assessments and other opportunities related to disaster relief.

The Comptroller's Texas Ahead Web portal (<http://www.texasahead.org/>) provides

information on tax programs and incentives, best practices and economic indicators, as well as reports and publications such as a recent report on Texas work force training, *Texas Works*. Texas EDGE also allows users to build customized models using region-specific data of their choosing.

Finally, the Comptroller's State Energy Conservation Office (SECO) can help local governments slash their energy costs and adopt cost-effective clean energy technologies. SECO offers local governments a free preliminary energy audit of their facilities. These audits provide recommendations for reducing electricity consumption by improving the efficiency of heating and air conditioning systems and lighting.

SECO is anticipating \$290.2 million in federal funds through the American Recovery and Reinvestment Act to help local governments save energy, create or retain jobs in the community, increase energy generation from renewable resources and reduce greenhouse gas emissions.



Shoppers congregate on the sidewalks in Fredericksburg

PHOTO: Texas Comptroller of Public Accounts



Shopping and Retail in the Alamo Region

The Alamo region's retail establishments generated \$30.6 billion in gross sales in 2008. About 40 percent or \$12.2 billion of that amount, was subject to state and local sales taxes. State and local sales taxes levied in the region totaled \$1 billion in 2008.

Alamo Region, Retail Gross Sales, Sales Tax and Wages, 2008

County	Gross Sales, 2008	Amount Subject to Sales Tax, 2008	Sales Tax, 2008	Employees, 2008	Retail Total Wages, 2008
Bexar	\$22,388,580,766	\$9,185,530,326	\$746,324,339	85,090	\$2,210,691,239
Comal	1,415,388,236	601,360,031	49,612,202	5,805	161,599,267
Guadalupe	994,248,540	430,165,717	35,488,671	3,939	94,223,517
Kendall	867,087,278	184,982,446	15,261,051	1,863	59,166,793
Victoria	1,454,069,793	690,131,686	56,935,864	5,743	142,727,457
All Other Counties	3,463,885,660	1,133,636,159	97,315,955	13,132	295,141,538
Total	\$30,583,260,273	\$12,225,806,365	\$1,000,938,084	115,578	\$2,963,549,811

Sources: Texas Comptroller of Public Accounts and Texas Workforce Commission.

In 2008, the Alamo region had 115,572 retail employees earning total wages of about \$3 billion.

The region offers a broad selection of retail shopping opportunities. In San Antonio, the Shops at La Cantera, within walking distance of the La Cantera resort and golfing community and the Fiesta Texas theme park, invites shoppers into an intimate outdoor setting featuring 160 specialty stores and retailers. The New Braunfels MarketPlace features 20 different brand-name outlet stores convenient to shoppers traveling between Austin and San Antonio.²³

Shopping in Fredericksburg

Fredericksburg is a unique blend of "German heritage and Texan hospitality" nestled in the Texas Hill Country, an hour away from San Antonio and 90 minutes from Austin. For the avid shopper, Fredericksburg offers a wide variety of opportunities. Many of the shops maintain distinctive nineteenth-century architecture. Main Street and the surrounding area consist of more than 150 shops, galleries and boutiques.

Fredericksburg's main attraction, and an anchor for regional economic development, is its antique and specialty shops. Many antique shops surround Main Street and its adjoining squares. Jackson's Uptown Market features a classic assortment of French, German and Italian furnishings. Red features a unique collection of vintage and modern furniture along with original antiques. Other retail shops include Root, which specializes in clothing, shoes, jewelry and handbags for women and teens, and Zert, which focuses on housewares, including candles, barware and home accessories.

The area also features a number of art galleries. The Fredericksburg Art Gallery specializes "in original paintings and bronzes by acclaimed artists from Texas and beyond" and features landscapes of Texas and the Southwest. Whistle Pik Galleries on Main Street offers a number of traditional pieces and bronzes, including works by artists such as Gerald Balciar and Jeff Legg. The area also features a number of bed and breakfasts. The Fredericksburg's Chamber of Commerce Convention and Visitor's Bureau is located off of Main Street.²⁴

More information about Alamo region travel and tourism can be found on the following page.



Travel and Tourism Industry Profile

The travel and tourism industry is Texas' second-most important "export-oriented" industry (i.e., serving consumers outside of the state), ranking behind oil and gas production and related manufacturing. In 2008, the tourism industry's contribution to the gross state product totaled \$23.8 billion. It also accounted for 2.2 percent of all state earnings and 3.8 percent of the state's jobs. The Alamo region has a higher percentage of overall earnings, 3 percent, and employment, 5 percent, related to travel and tourism than does the state.²⁵

While the industry is of high importance to the overall state economy, it is of even greater importance in non-metropolitan areas.²⁶ In the Alamo region, travel and tourism is most important to Bandera County, where 11 percent of earnings and 17.6 percent of employment are attributable to the industry. Interestingly, Bandera County is one of only three Texas counties in which both earnings and employment for this industry contribute more than 10 percent of the county total (the other two are Brewster County in the Upper Rio Grande region and Llano County in the Capital region).²⁷

The table below shows growth indices for visitor spending relative to the base year of 2000, in which spending values are equal to 100 for that year. The graph compares areas in the Alamo region to the state as a whole. In 2008, the Alamo region received \$6.8 billion in visitor spending, up 30 percent from 2000, outpacing the state gain of 23 percent over the same period (as adjusted to 2008 dollars).

The region's non-metro counties saw the highest increase in visitor spending, at 34 percent. Dewitt County led the region in increased visitor spending, at 65 percent, rising from \$26.9 million to \$44.3 million. This increase accounted for 24 percent of the total growth in visitor spending among the non-metro counties. Gillespie County's visitor spending rose by 51 percent from 2000 to 2008, accounting for 35 percent of visitor spending growth for the non-metro counties. Kerr County had the largest amount of visitor spending among non-metro counties in 2008, with \$89.3 million.²⁸

Visitor spending in San Antonio exceeded \$6 billion in 2008, up 30 percent from 2000. Victoria generated \$218 million in visitor spending in 2008, an 18 percent increase since 2000.

Percent of Travel and Tourism Earnings and Employment to Overall County Earnings and Employment, 2008

Earnings (in millions)

Top 6 Counties	Total	Travel and Tourism Related	Percent of County Earnings
Bandera	\$145	\$16	11.0%
Kendall	\$624	\$18	2.9
Kerr	\$1,041	\$34	3.3
Gillespie	\$441	\$22	5.0
Bexar	\$48,314	\$1,496	3.1
Comal	\$2,124	\$77	3.6
Alamo Total	\$60,084	\$1,779	3.0%
State Total	\$768,203	\$16,780	2.2%

Source: Dean Runyan Associates, The Economic Impact of Travel on Texas.

Employment

Top 6 Counties	Total	Travel and Tourism Related	Percent of County Employment
Bandera	8,300	1,460	17.6%
Kendall	16,090	940	5.8
Kerr	30,920	1,780	5.8
Gillespie	16,980	960	5.7
Bexar	1,015,390	54,540	5.4
Comal	58,010	2,990	5.2
Alamo Total	1,362,450	68,000	5.0%
State Total	14,497,000	544,000	3.8%

Source: Dean Runyan Associates, The Economic Impact of Travel on Texas.



Travel and Tourism Industry Profile (cont.)

The following sites are some of the Alamo region's top tourist destinations:

The Alamo and Other San Antonio Missions

When many people think of San Antonio, the first thing that comes to mind is the Alamo. This historic Catholic mission, originally known as Mission San Antonio de Valero, was first constructed in 1724 and was home to Spanish missionaries for several decades. The site served as a military garrison during Mexico's fight for independence from 1810 through 1821. Most famously, the Alamo was the site of an 1836 battle in which fewer than 250 soldiers fighting for Texas' independence died in an attempt to hold off thousands of Mexican troops. Among those who perished in defense of the Alamo were Jim Bowie, William Barrett Travis and Davy Crockett.

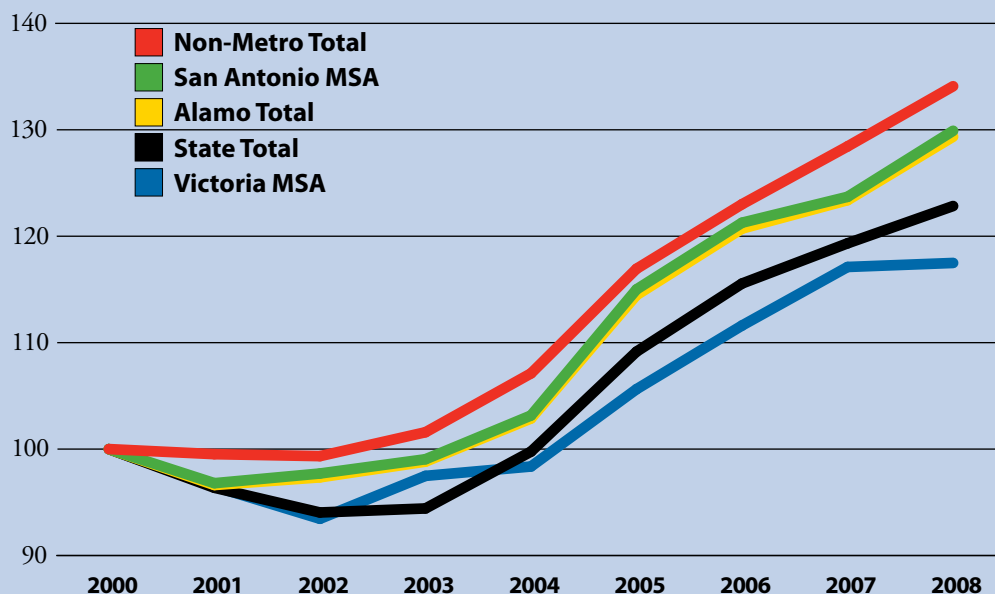
Today, the Alamo is a museum. The building and its surrounding grounds are owned by the state of Texas and operated by the Daughters of the Republic of Texas.

The grounds feature an impressive display of artifacts and exhibits that illustrate this seminal period in Texas history. In 2008, the Alamo received more than 2.5 million visitors.²⁹

In addition to the world-famous Alamo, San Antonio has four other historic missions: Mission Concepcion, Mission San Jose, Mission San Juan and Mission Espada. Collectively referred to as San Antonio Missions National Historic Park, these sites are operated by the National Parks Service (NPS).

NPS operates a visitor center at Mission San Jose that houses a museum showcasing colonial artifacts and describing everyday life at the Spanish missions. The Archdiocese of San Antonio hosts religious services at the four missions to this day. NPS staff operates guided tours and historical demonstrations at each, and visitors can enjoy attractive and peaceful park settings as they visit the sites. In 2008, San Antonio Missions National Historic Park welcomed more than 1.3 million visitors.

**Visitor Spending Growth Index by Area, 2000-2008
(Real 2008 Dollars)**



Source: Dean Runyan Associates, *The Economic Impact of Travel on Texas*.



Travel and Tourism Industry Profile (cont.)

The missions are connected by the eight-mile Missions Hike and Bike Trail. This scenic, paved pathway follows the San Antonio River through historic neighborhoods and natural areas. The hike-and-bike trail also passes other historic attractions such as the Espada Aqueduct, an irrigation system used to channel water to the missions, and the Steves Homestead, a 19th-century mansion now restored as a museum.³⁰

SeaWorld

SeaWorld San Antonio, owned and operated by Busch Entertainment Corporation, is located 16 miles west of downtown San Antonio, just inside Loop 1604. The park is home to four roller coasters and numerous marine animal shows. 'Lost Lagoon,' a water park within SeaWorld, offers water slides and other water-based recreation. In addition, SeaWorld offers educational programs that give children and adults up-close visits with sea animals such as sea lions and beluga whales. The park also hosts day and resident camps for various age groups, from children to adults seeking careers in zoology.

In 2008, SeaWorld received the Water Saving Pioneer Award for its water conservation efforts. Filtration systems strategically placed throughout the park advance the organization's goal to save 30 million gallons of water each year.

SeaWorld is open from May through December, with seasonal events such as live concerts running from June to December.³¹

Six Flags Fiesta Texas

The Alamo region is also home to Six Flags Fiesta Texas, a theme park known for its numerous thrill rides and live shows. The park has more than 50 rides and attractions ranging in intensity from children's rides to adult roller coasters. Guests can also enjoy a water park offering water slides and a wave pool.

The park also stages live shows featuring music, dancing and comedy, including a summer concert series that

runs from May 25 to Sept. 7. Due to its outstanding live performances, Fiesta Texas has received *Amusement Today* magazine's Golden Ticket Award for "Best Theme Park Shows in the Country" for 10 consecutive years. The park's involvement in the community extends beyond employment; in June 2009, for instance, the park hosted a walk-a-thon to raise awareness and funding for children with cancer.

Fiesta Texas is a 15-minute drive west of downtown San Antonio.³²

San Antonio Riverwalk

One of San Antonio's most recognizable attractions is its Riverwalk, which snakes through downtown and soon will extend to 13 miles, offering attractions such as hotels, restaurants, shops, museums and art galleries along the river banks.

The Riverwalk was initially built as a flood control mechanism for the city. While its waters flow for just a few miles through the city, the San Antonio River runs for 131 miles before joining the Guadalupe River. In the past, the downtown area was prone to flooding. In 1929, the San Antonio Conservation Society backed a proposal by Robert H. H. Hugman to mitigate the flooding by developing a river system that runs through town. Today, the Riverwalk has evolved into a lively mixed-use area maintained by the San Antonio Parks and Recreation Department.

Admission to the Riverwalk area is free. For a fee, visitors can ride the numerous river cruisers that ferry back and forth along the water. These boats offer tours and service to museums and businesses.³³

Schlitterbahn Water Park and Resort

Just north of San Antonio, in New Braunfels, is an award-winning water park and the world's first "water resort." Schlitterbahn Water Park and Resort boasts rides, accommodations and eateries for family-friendly fun in the heart of south central Texas.



Travel and Tourism Industry Profile (cont.)

In 1966, Bob and Billye Henry began building the renowned water park along with their children. They relied heavily on their imagination and their own ideas to develop the original plans. The Henrys have continued to invest in the resort, and today, Schlitterbahn is home to 65 acres of tube chutes, pools and much more. As many as 1 million people visit the park annually during its 110-day season.

Since 1998, *Amusement Today* magazine readers have voted Schlitterbahn the nation's best water park every year, and in 2006 the Travel Channel named it the world's number-one waterpark.³⁴

The Henrys' enterprise has expanded to include water parks on Galveston Island, South Padre Island and in Kansas City, Kansas. The Schlitterbahn organization is involved with its communities through its Kinderbahn program, which reaches out to local charity groups by donating tickets to send children to Schlitterbahn for days of fun and relaxation.³⁵

River Recreation

The Alamo region includes many rivers that Texans can take advantage of during hot weather. Weekends will find the water crowded with hundreds of visitors floating along the current, lounging on inner tubes.

The Comal River, which stretches only 2.5 miles before joining the Guadalupe, offers a tube chute and gently flowing running water through New Braunfels. Also located in the New Braunfels area is the Guadalupe River, which is very wide with rapids and boulders.³⁶

The area has about 30 tube rental locations employing about 30 people each. Locations along the Comal and Guadalupe rivers rent between 500 and 1,000 tubes daily during peak times.³⁷

The Frio River in Frio County offers 47 miles of cold, slow-moving water and rapids and generally has about half the business of the New Braunfels-area rivers. The Frio is lined with large cypress trees and has very clear water.³⁸



Blastenhoff Beach, Schlitterbahn, New Braunfels

PHOTO: Schlitterbahn



Savings Institutions Industry Profile

Savings institutions (savings associations and savings banks) are businesses that accept time deposits, make mortgage and real estate loans and invest in high-grade securities. Traditionally, savings banks concentrate on serving individuals rather than businesses, and do not make business loans or participate in commercial banking.

In the Alamo region, savings institutions accounted for 5,347 jobs and \$300.6 million in wages in 2008.

Most of these jobs are at San Antonio's two largest savings institutions, United Services Automobile Association (USAA) and Wachovia, recently purchased by Wells Fargo.

USAA offers insurance and financial services to serving members of the military, military retirees and military dependents. The company was founded in 1922 by 25 Army officers who could not obtain vehicle insurance and decided to insure each other. Today, USAA offers auto, homeowners and life insurance; a full line of banking products and services; investment products; and financial planning services.

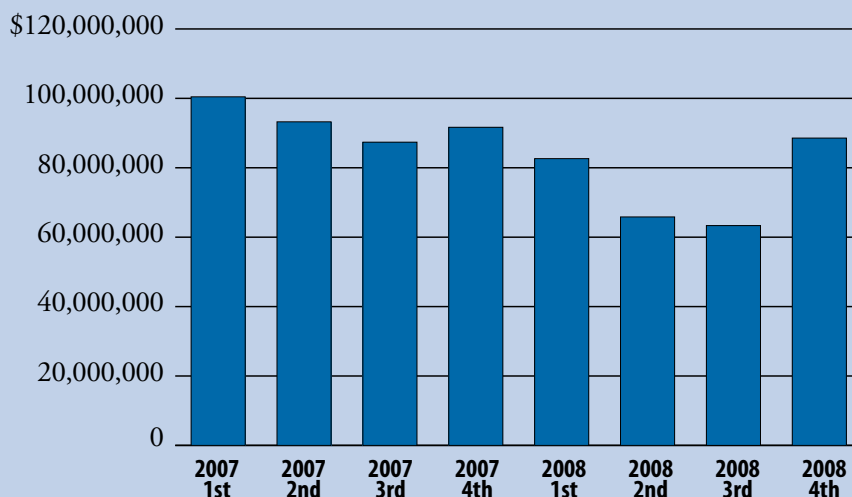
At present, USAA has about 6.8 million clients. The company employs about 22,000 people and has \$119 billion in owned and managed assets. While headquartered in San Antonio, USAA has six other locations in the U.S. and two international offices.³⁹

USAA established its Federal Savings Bank in 1983 with 12 employees; today, its staff has grown to about 3,000. In 2008, the bank had \$27.3 billion in deposits and posted \$302 million in profits. The bank has about 4.1 million members; unlike USAA's insurance division, however, the bank can also serve non-military residents of Bexar County. Like most banks, it offers primary retail banking services such as checking and savings accounts, mortgage loans, credit and debit cards and online and mobile banking. It is not involved in commercial banking.⁴⁰

In 1994, World Savings Bank opened a support center in San Antonio that provided savings and loan operations across the country with administrative services. In 2006, Wachovia purchased World Savings' parent company, Golden West Financial Corporation, and assumed control of the center. The center provides loan servicing, underwriting and mortgage support from this multi-building complex on the city's northwest side. Although employment at this facility has declined over the past several years, in 2008 Wachovia employed 3,300 in San Antonio, primarily at the operations center. Wells Fargo purchased Wachovia in December, 2008.⁴¹

Frost Bank has been headquartered in San Antonio since its founding in 1868. Although not a savings institution as formally defined, Frost Bank offers commercial as well as consumer services, brokerage services, insurance products and investment services. The bank is now part of Cullen/Frost Banker, Inc., with assets of about \$15.8 billion. Frost Bank is the largest Texas-based bank operating only within the state, and has about 100 financial centers including offices in Austin, Corpus Christi, Dallas, Fort Worth, Houston and the Rio Grande Valley.⁴²

Savings Institution Wages by Quarter, Alamo Region, 2007 and 2008



Source: Texas Comptroller of Public Accounts.



James Avery Craftsman

Known for fine religious jewelry, James Avery Craftsman began in 1954 with James Avery working in an old garage in Kerrville, using simple tools and scraps of copper and silver. By 1957, James Avery had created his first jewelry catalog containing 39 handmade items. A few years later, the company became James Avery Craftsman Inc. and moved to 20 acres purchased in Kerrville.

Today, the company employs 1,300 full- and part-time workers (and more during holiday seasons) and is a completely integrated business, managing all of its own graphics, manufacturing, designing and marketing. The company offers designs in silver and gold in both religious and non-religious themes. In addition to Kerrville, the company has expanded its manufacturing plants to several other sites in Texas including Hondo, Fredericksburg and Comfort.

James Avery Craftsman also contributes to the Hill Country community by working with and donating to the Peterson Regional Medical Center. The company actively participates in community events with the Witte Museum in San Antonio and supports the Texas wildlife habitat community. It also contributes to and participates with many other national and local organizations.⁴³

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Demographics

The Alamo region consists of 19 counties and includes the metropolitan statistical areas (MSAs) of San Antonio (Atascosa, Bandera, Bexar, Comal, Guadalupe, Kendall, Medina and Wilson counties) and Victoria (Calhoun, Goliad and Victoria counties). As defined by the federal government, an MSA is a core urban area of 50,000 or more residents accompanied by adjacent communities that have a high degree of economic and social interaction with that core (as measured by commuting to and from work).¹

In 2008, the San Antonio MSA had an estimated population of 2,031,445, accounting for 87.5 percent of the region's total population of 2,320,572.² **Exhibit 9** illustrates the region's counties and their county seats.

Population Growth

The Alamo region's population rose by an estimated 16.5 percent from 2000 to 2008, nearly matching state growth of 16.7 percent. The San Antonio MSA population increased by 18.7 percent during this period and accounted for 97.2 percent of the region's growth. Non-metro counties in the region increased their population by 3.8 percent, while the Victoria MSA's number of residents rose by 2.4 percent. The projected annual population increase from 2008 to 2013 is 1.8 percent in San Antonio, 0.6

The San Antonio MSA population increased by 18.7 percent from 2000 to 2008 and accounted for 97.2 percent of the region's growth.



University of Texas at San Antonio campus

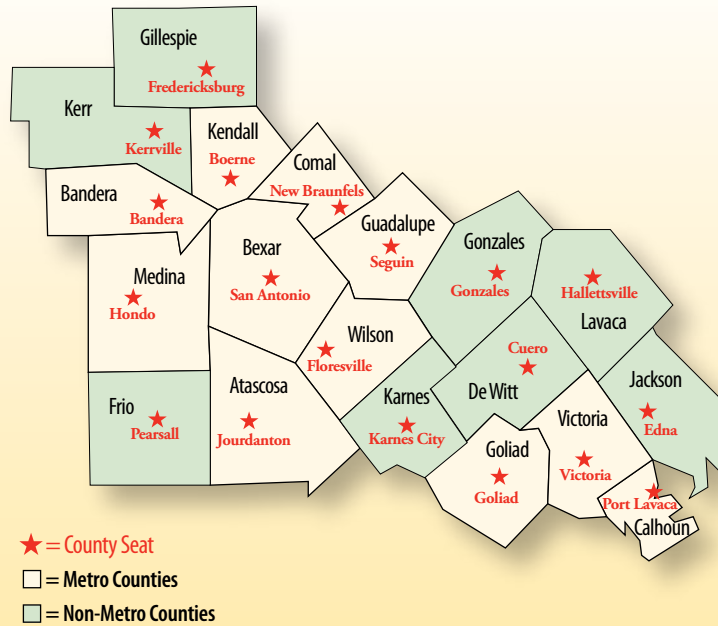
PHOTO: Patrick Roy Dunn/UTSA Images



percent in Victoria, and 0.8 percent in non-metro counties. The Alamo region and the

Exhibit 9

Alamo Region Metro Counties



Sources: Office of Management and Budget and Texas Comptroller of Public Accounts.

state are expected to grow 1.7 percent annually during this period. **Exhibit 10** presents population change in the form of growth indices relative to the base year of 2000, in which values are equal to 100 for that year.³

Three counties in the region were among the nation's 100 fastest-growing counties from 2000 to 2008 – Comal (40.5 percent), Kendall (38.5 percent) and Guadalupe (31.6 percent).⁴ All of these counties are in the San Antonio MSA.

Ethnicity

Exhibit 11 compares the ethnic makeup of the Alamo region to the U.S. and Texas. The Alamo region is majority Hispanic, at 50.5 percent of the population, followed by whites at 40.1 percent and blacks at 5.9 percent. The remaining 3.5 percent fell in the “other” category, which includes persons of American Indian, Asian and Native Hawaiian descent and those claiming descent from two or more races.

Texas Independence Trail

In 1997, the Texas Historical Commission created the Texas Historical Trails Program to bring economic development to rural regions in Texas. One of the program's trails, the Texas Independence Trail, travels 200 miles, connecting San Antonio, Houston and Galveston. The trail includes several counties and communities in the Alamo region.

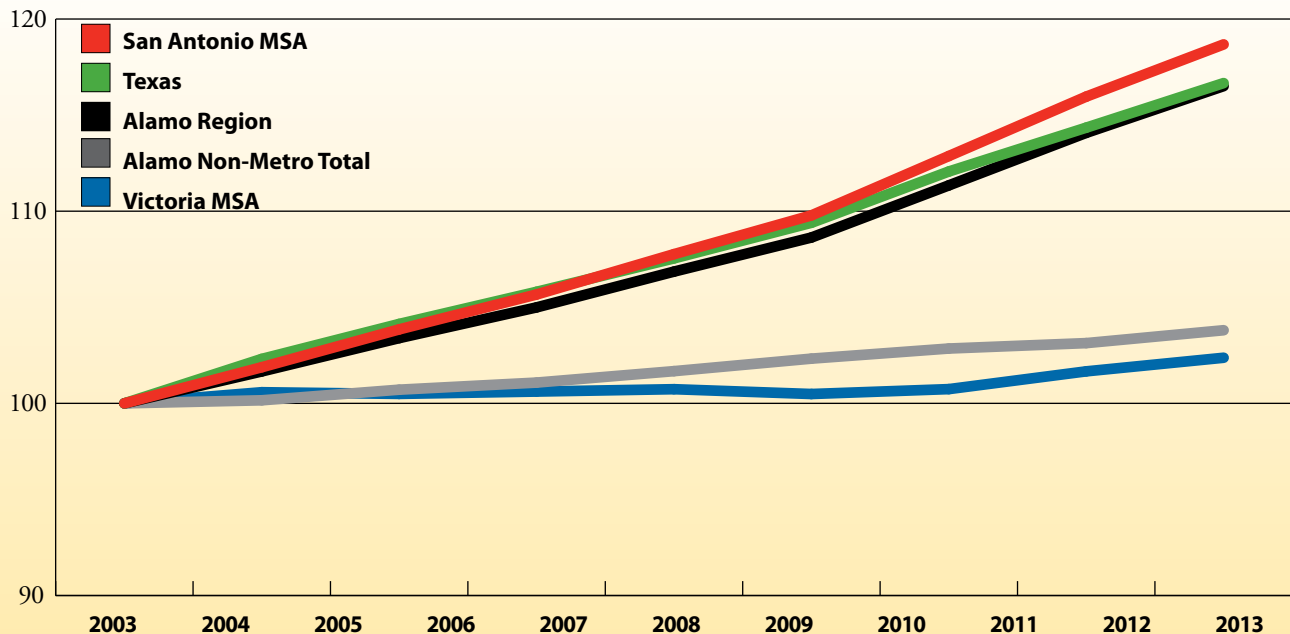
The town of Goliad was the setting for an 1835 battle almost as famous as the Alamo siege. In its aftermath, Colonel James Fannin and his surviving troops were executed by Mexican forces. The area's mission, the Presidio La Bahía, is operated by the Catholic Diocese of Victoria. Visitors can walk through the historical landmark and spend time at the Fannin Memorial Monument. In downtown Goliad, the city maintains the Market House Museum and the restored Goliad County Courthouse. Goliad State Park offers exhibits depicting life in the time of the Texas war for independence.

The first small fight in that war occurred in Gonzales, a town often referred to as the “Lexington of Texas.” In the Gonzales Memorial Museum, the famous village cannon that inspired the “Come and Take It” flag is on display. The town also maintains the Gonzales Pioneer Village, which replicates the time period with 10 historical structures.

San Antonio is a major stop on the Texas Independence Trail. In addition to the Alamo and the other missions, visitors to the city can visit the Spanish Governor's Palace, the colonial seat of governance. Visitors wishing to travel the self-guided Texas Independence Trail can contact the Texas Historical Commission for more information and brochures.⁵



Exhibit 10

Alamo Region Estimated and Projected Population, 2003-2013

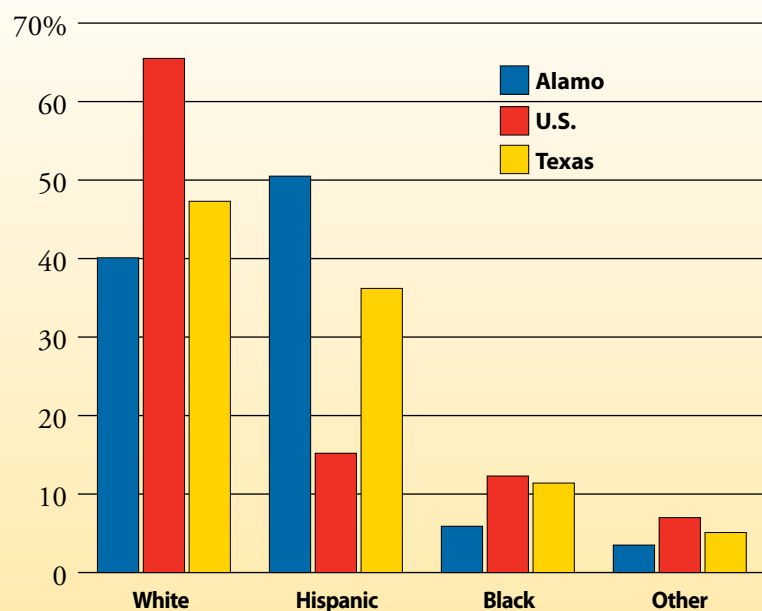
Sources: U.S. Census Bureau and Economic Modeling Specialists Inc.

Most of the region's ethnic makeup is determined by San Antonio MSA, where the distribution is 52.6 percent Hispanic, 37.6 percent white and 6 percent Black. In non-metro counties, 61.5 percent of the population is white, 31.6 percent Hispanic and 5.4 percent black (**Exhibit 12**).⁶

Age

San Antonio has a younger population than Victoria and the non-metro counties. For example, about one in ten residents of San Antonio are above the age of 65, compared to nearly one in five for persons living in non-metro counties. And 38 percent of the San Antonio population is under 25, compared to 31.8 percent in non-metro counties. San Antonio also has a higher share of its population between the ages

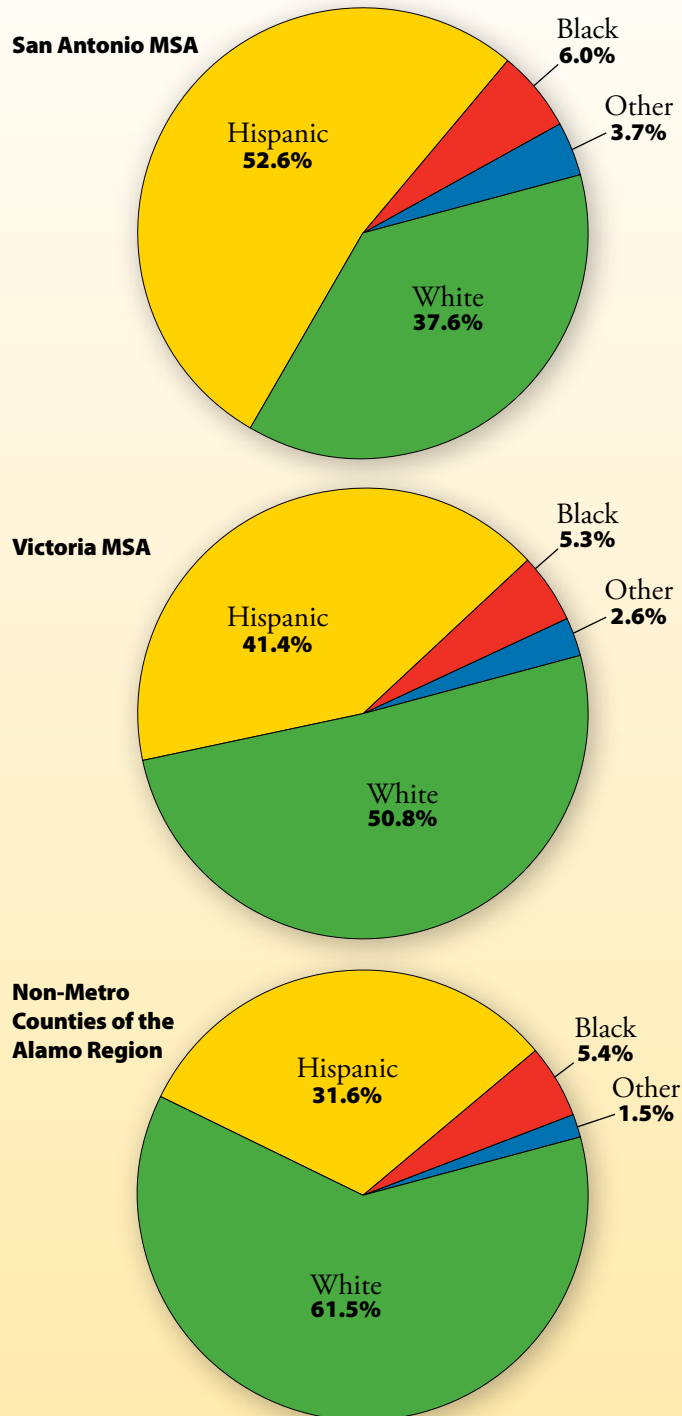
Exhibit 11

Alamo Region, Texas and U.S. Population by Ethnicity, 2008

Source: Economic Modeling Specialists Inc.



Exhibit 12

San Antonio MSA, Victoria MSA and Non-Metro Counties Population by Ethnicity, 2008

Totals may not equal 100 percent due to rounding.
Source: Economic Modeling Specialists Inc.

of 25 and 44 than in the rest of the region (Exhibit 13).

Educational Attainment

The average educational attainment of Alamo region residents above the age of 25 is lower than both Texas and U.S. averages. Nearly 30 percent of San Antonio residents have earned an associate degree, bachelor's

Famous People

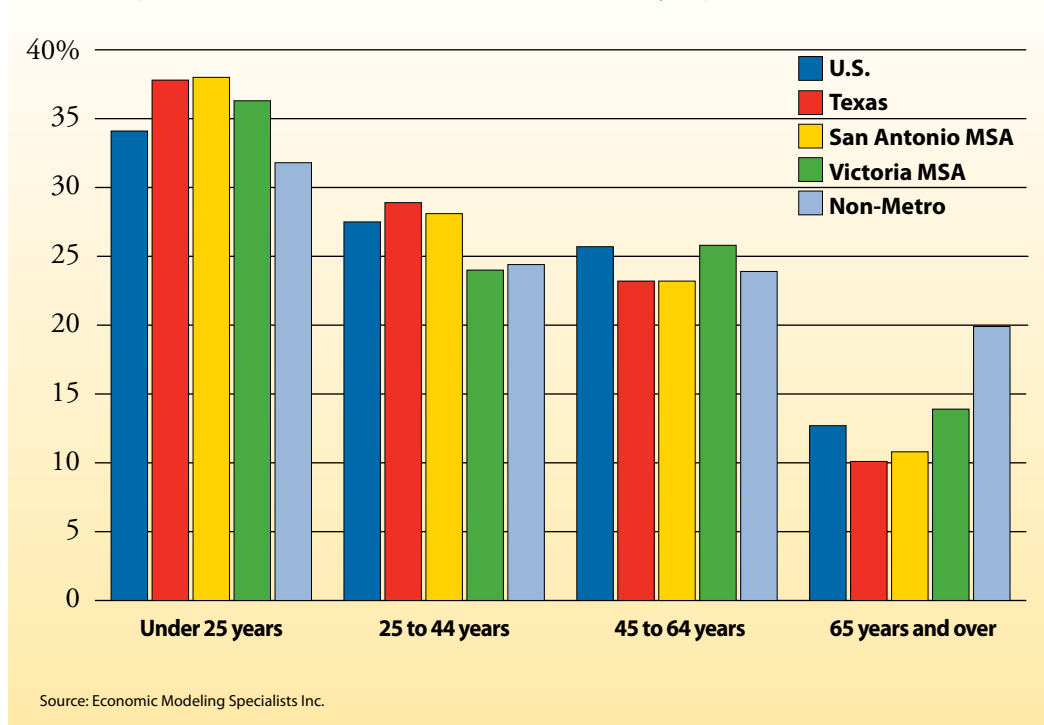
The Alamo region has produced a diverse group of well-known individuals. Academy Award winner Joan Crawford, born in San Antonio, is best known for her role in *Mildred Pierce* and numerous Broadway hits. Also from San Antonio, and a recipient of numerous Emmys and awards, is Carol Burnett, star of *The Carol Burnett Show*. Another San Antonio actress, Michelle Rodriguez, has been in numerous action films as well as the ABC-TV series *Lost*. Yet another Alamo city native, Robert Rodriguez, has directed numerous films from the *Spy Kids* series to *Desperado*.

One of the nation's most recognized Mexican American figures, Henry Cisneros thrived as the four-term mayor of his hometown of San Antonio before becoming a secretary of Housing and Urban Development for President Clinton. Former President Lyndon Baines Johnson was born in Stonewall, just a short distance from the town his family founded.

Aaron Ross, former University of Texas and current New York Giants corner-back, is originally from San Antonio, as was Dr. Robert Cade, the developer and inventor of Gatorade.⁷



Exhibit 13

Alamo Region Areas, Texas and U.S. Population by Age, 2008

degree or higher, equaling the state rate. In Victoria and the non-metro counties, the rate is 22.2 percent and 21.5 percent, respectively. These rates trail the U.S. average of 33 percent and the Texas rate of 30 percent.⁸

On the other hand, just 18.8 percent of San Antonio's residents lack a high school diploma, lower than the state rate of 21 percent. This rate is 21 percent in Victoria and 23 percent in the non-metro counties. The U.S. share is 16 percent (**Exhibit 14**).

Unemployment

In the midst of an economic recession, the Alamo region's unemployment rate is lower than national and Texas levels. In July 2009, the Texas unemployment rate was 8.2 percent, well below the U.S. rate of 9.7 percent.

(text continued on Page 50)

Shiner Brewery

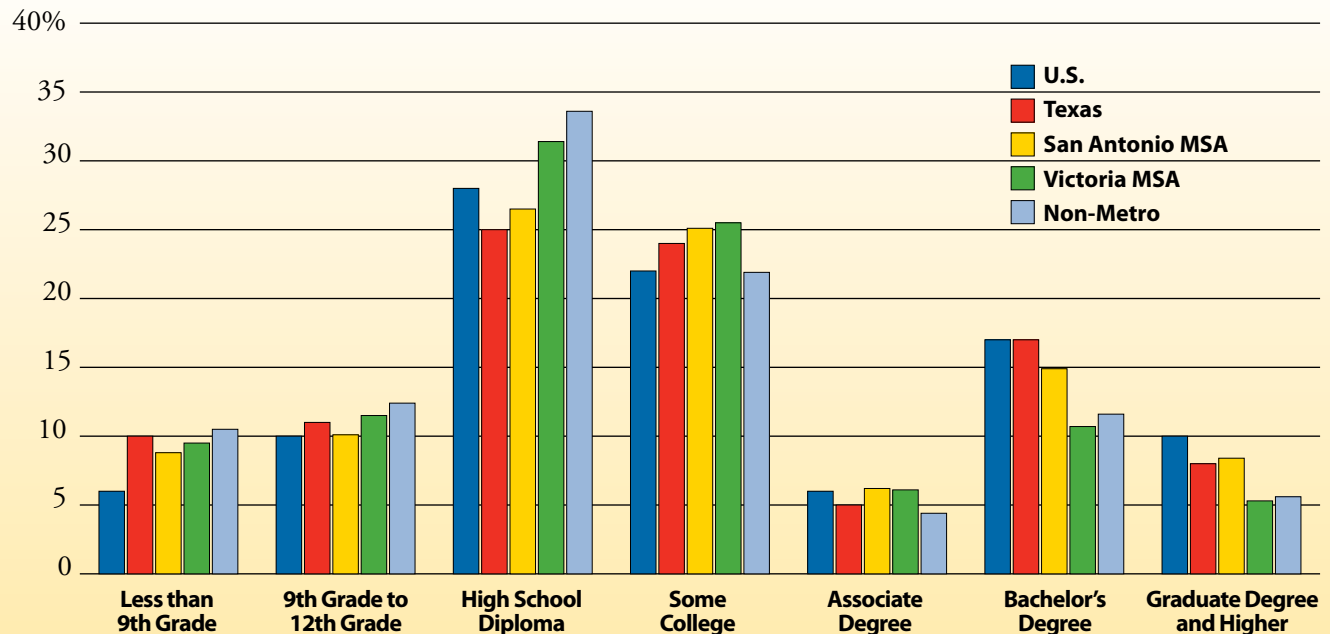
More than 100 years ago, Germans and Czechs settled in the Shiner area, bringing with them a lively beer culture. The Shiner Brewing Association, formed in 1909, developed a beer that debuted as Shiner Premium.

The association leased the brewery to German brewmaster Kosmos Spoetzl in 1915, giving him the option to buy it. Just one year later, Spoetzl did so. The brewery carried on through Spoetzl's daughter and then on to other brewmasters, but the original recipes and brewing system remained the same. In 2005, John Hybner stepped down as the Spoetzl Brewery's longest-serving brewmaster, with Jimmy Mauric taking over as his replacement.

Spoetzl Brewery hosts "Bockoberfest" every October with a bike ride between Austin, San Antonio and Houston, and ending at the Shiner brewery. Spoetzl continues to be one of the oldest independently owned breweries and is the nation's fourth-largest craft brewer. Even so, the brewery's family is small, with only 55 full-time employees.⁹



Exhibit 14

Educational Attainment of Persons Above the Age of 25, Alamo, Texas and U.S. Averages, 2008

Source: Economic Modeling Specialists Inc.

Landmark Inn State Historic Site

The Landmark Inn in Castroville is located on the Caminos Real de Los Tejas trail, or the Old San Antonio Road, and was a popular rest stop for weary travelers in the 19th century.

Castroville was founded by Alsatian immigrants led by French citizen Henri Castro, who worked with Sam Houston and the Texas government to obtain a land grant of more than a million acres west of San Antonio near the Medina River. Seven hundred Alsatian farmers and their families established Castroville on September 12, 1844.¹⁰

The Alsations built a gristmill, pond, cotton gin, lumber mill and a store that became today's Landmark Inn. Originally known as Cesar Monod's store, it became the Vance Hotel in the 1850s. In 1927, John and Ruth Lawler bought the old hotel and gristmill. They converted the gristmill into an electric power plant, and in 1974 Ruth changed the name of the Vance Hotel to Landmark Inn.¹¹

Today, the Landmark Inn State Historic Site, set on five acres, preserves and illustrates Alsatian culture in Texas. Its European architecture is unique to the region, with white-washed limestone walls mortared with adobe. The site includes the old hotel, now a deluxe bed and breakfast, as well as a museum, gift shop, butterfly garden, gristmill with pond and historic bathhouse. The nearby Medina River offers fishing and swimming. A reception hall is available for special events such as weddings and family reunions.

Bicycle and walking tours can be arranged to see historic Castroville, which has many quaint homes in the French-German tradition of Alsace.¹²



Sports Teams and Performing Arts

The Alamo region is home to a variety of entertainment related to sports and the performing arts. From local to national-level events, the area has something for everyone.

Sports Teams

The San Antonio Spurs basketball team began when the Dallas Chaparrals were sold to a group of investors in 1973. The team relocated to San Antonio and played their first game at the HemisFair Arena.

Since then, the team has changed hands several times, most recently passing to a group of 22 investors in 1993. The current Spurs chairman of the board is Peter M. Holt, CEO of Caterpillar Inc., which recently announced plans to build a factory in nearby Seguin, (see page 20).

The team won national championships in 1999, 2003, 2005 and 2007. Spurs player Tim Duncan won the NBA Most Valuable Player in 2002 and 2003, while David Robinson won the award in 1995. The Spurs' coach, Gregg Popovich, was selected as Coach of the Year in the 2002-2003 season.

Average attendance at Spurs home games in the 2007-2008 season was 18,565; in all, 761,149 fans attended their home games in that year. The team has strong ties to its community. Players and staff are involved in numerous volunteer projects and make year-round personal appearances.

In 2003, Spurs Sports and Entertainment announced that the Utah Starzz women's basketball team would relocate to the Alamo city and become the San Antonio Silver Stars. The team advanced to the playoffs in the 2008 season, attracting an average of 8,029 fans to its home games. As with the Spurs, the Silver Stars are very involved in the community and participate in the Spurs Foundation. Another venture from the Spurs franchise, the San Antonio Rampage hockey team, is a member of the American Hockey League and the Western Conference. The team concluded the 2007-2008 season with a trip to the playoffs and one post-season series win.

The San Antonio Missions minor league baseball team has participated on and off in the Texas League since 1888. The team has been affiliated with the San Diego Padres franchise since 2007. It is owned and operated by David Elmore and Elmore Sports Group. The Nelson W. Wolff Stadium, opened in 1994, serves as the team's home field. Its official sponsor is local Texas grocer H-E-B.

Performing Arts Centers

Port Lavaca's Main Street Theatre thrived as a playhouse in the 1930s and 1940s. In later years, however, the theatre closed and fell into disrepair. In 1983, Russell Cain purchased the theatre and donated it to the Main Street Committee, a group focused on revitalizing downtown, in 1992. Two years later, after extensive renovation, the theatre celebrated a grand reopening with a new stage and balcony and 263 seats. Today, the Main Street Theatre once again hosts all kinds of productions, from concerts to fashion shows.

The Brauntex Performing Arts Theatre in downtown New Braunfels first opened its doors in 1942 as a movie theater. Community leaders met in 1998 and developed a plan to renovate the building as a modern theatre venue. The 600-seat theater now hosts shows including symphony concerts.

San Antonio's Majestic Theatre, first opened in 1929, was the most ornate and modern movie palace in South Texas, and the first to be fully air-conditioned. Its stage and surrounding walls are designed in Spanish Mission, Baroque and Mediterranean styles. The Majestic hosted concerts, live plays and motion pictures until its closing in 1974.

In 1976, the theater was donated to the newly formed Majestic Foundation, which restored and expanded the historic building. The 2,311-seat theater is now home to the San Antonio Symphony and hosts traveling Broadway shows.¹³



All but three counties in the Alamo region measured at or below the state unemployment rate. Gillespie County had the lowest unemployment rate in the region at 4.7 percent and Karnes County the highest at 10.4 percent. Both San Antonio MSA and Victoria MSA also had lower rates than the state, 7.1 and 8.0 percent, respectively.¹⁴

Income

Exhibit 15 ranks the Alamo region's counties by median household income for 2007, and lists corresponding poverty rates for all persons and for persons under age 18. Six counties in the region exceed the state median household income of \$47,563, led by Kendall County with \$67,471 – the

Exhibit 15

Median Household Income, Percent of Population in Poverty and Percent of Population Under Age 18 in Poverty, 2007

Area	Median Household Income, 2007	Percent of Population in Poverty, 2007	Percent of Population Under Age 18 in Poverty, 2007
U.S.	\$50,740	13.0	18.0
Texas	47,563	16.3	23.1

Alamo Region Counties (Ranked by 2007 Median Household Income)

Area	Median Household Income, 2007	Percent of Population in Poverty, 2007	Percent of Population Under Age 18 in Poverty, 2007
Kendall County	\$67,471	8.6	12.8
Comal County	58,589	9.8	13.3
Wilson County	55,593	11.0	15.8
Guadalupe County	52,862	9.6	14.7
Gillespie County	49,818	9.9	15.7
Jackson County	48,497	14.6	21.4
Victoria County	45,436	16.2	24.9
Medina County	44,606	14.8	20.3
Bexar County	44,587	16.4	23.1
Goliad County	44,571	15.8	22.4
Bandera County	43,260	13.4	22.5
Kerr County	42,642	16.4	30.4
Calhoun County	41,822	15.7	23.2
Atascosa County	40,186	18.1	25.6
Lavaca County	38,025	13.2	18.3
DeWitt County	34,806	19.4	27.2
Gonzales County	33,751	18.6	28.7
Karnes County	31,818	26.5	32.2
Frio County	29,583	28.9	38.6

Sources: U.S. Census Bureau and Texas Comptroller of Public Accounts.



fifth-highest in Texas. Four counties exceed the U.S. level of \$50,740.¹⁵

The Alamo region's overall income per person averaged \$33,596 in 2007, lower than Texas and U.S. averages. Three counties in the region exceeded the state average in 2007 — Kendall, Kerr and Gillespie.

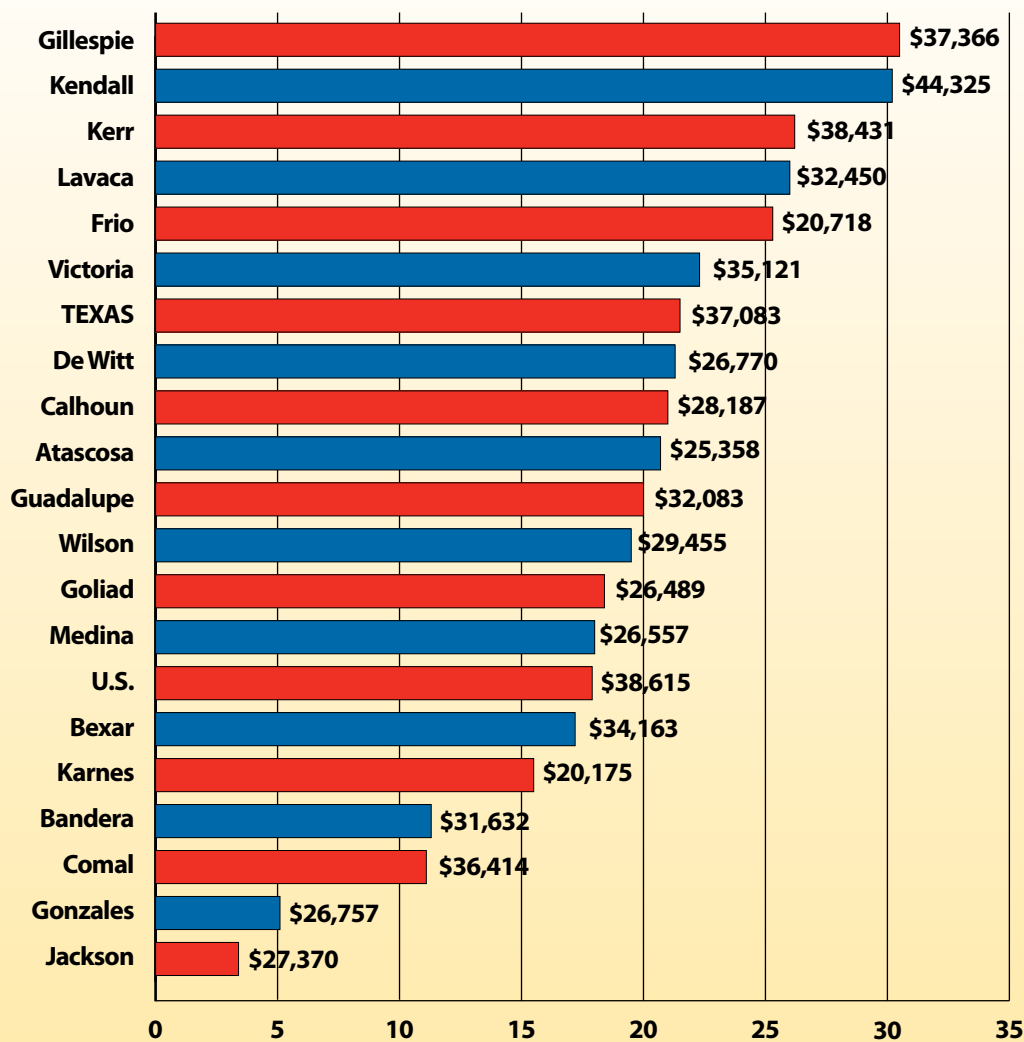
Exhibit 16 shows per capita personal income

percent growth between 1997 and 2007 and the county's 2007 personal per capita income value (dollar values adjusted to 2007 values).

Both San Antonio's and Victoria's per capita income fell below the state average for metropolitan counties. Per capita income in the region's rural counties, however, exceeded the Texas average for rural counties.¹⁶

Exhibit 16

U.S., Texas and Alamo Region Per Capita Personal Income Percent Increase, 1997-2007



Source: U.S. Department of Commerce, Bureau of Economic Analysis.



Public Safety

According to the Texas Department of Public Safety (DPS), the Alamo Region's overall crime rate rose by 3.7 percent from 2006 to 2007, while the statewide rate increased by .7 percent during the same time period. Only assaults declined in the region, while all other categories rose.

DPS also reports that the Alamo region employed more than 4,300 commissioned peace officers and more than 3,000 civilian public safety workers in 2007. (A commissioned peace officer has taken training courses and is certified by the Texas Commission on Law Enforcement. Civilian staff includes administrative professionals, jailers and other non-certified workers.)

The Comptroller's office estimates that federal, state and local public safety jobs in the region accounted for almost \$31 million in earnings in 2007.¹⁷

Crime Rates – Alamo Region, 2006-2007

Crime	2006 Alamo Crime Rate	2006 Texas Crime Rate	2007 Alamo Crime Rate	2007 Texas Crime Rate	Alamo Change in Crime Rate	Texas Change in Crime Rate
Murder	6.8	5.9	6.5	5.9	-4.4%	0.0%
Rape	37.1	35.8	41.0	35.3	10.5	-1.4
Robbery	119.8	158.5	124.5	162.2	3.9	2.3
Assault	305.8	317.4	264.2	307.8	-13.6	-3.0
Violent Crime	469.5	517.6	436.2	511.2	-7.1	-1.2
Burglary	949.7	917.8	1,048.6	955.2	10.4	4.1
Larceny	3,445.2	2,756.9	3,572.5	2,771.4	3.7	0.5
Auto Theft	358.7	407.3	361.6	393.3	0.8	-3.4
Property Crime	4,753.6	4,082.0	4,982.7	4,119.9	4.8	0.9
Total Crime Rate	5,223.1	4,599.6	5,418.9	4,631.1	3.7%	0.7%

Note: All crime rates are reported per 100,000 population.
Source: Texas Department of Public Safety.

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Infrastructure and Natural Resources

A region's economic viability is bounded by the capacity of its infrastructure. A growing population and thriving economy need ready access to resources such as clean water, transportation and energy. In addition, residents, employers and tourists all appreciate recreational and leisure opportunities. Fortunately, the Alamo region can offer all of these resources.

While maintaining and expanding infrastructure requires continual effort, the region has a solid basis for future economic growth.

Water

The Alamo region is one of distinctly Texan natural beauty, with clear waters bubbling through Hill Country limestone on their way through rolling green hills to the Gulf of Mexico. The region has abundant water resources, but also has an ever-increasing water demand.

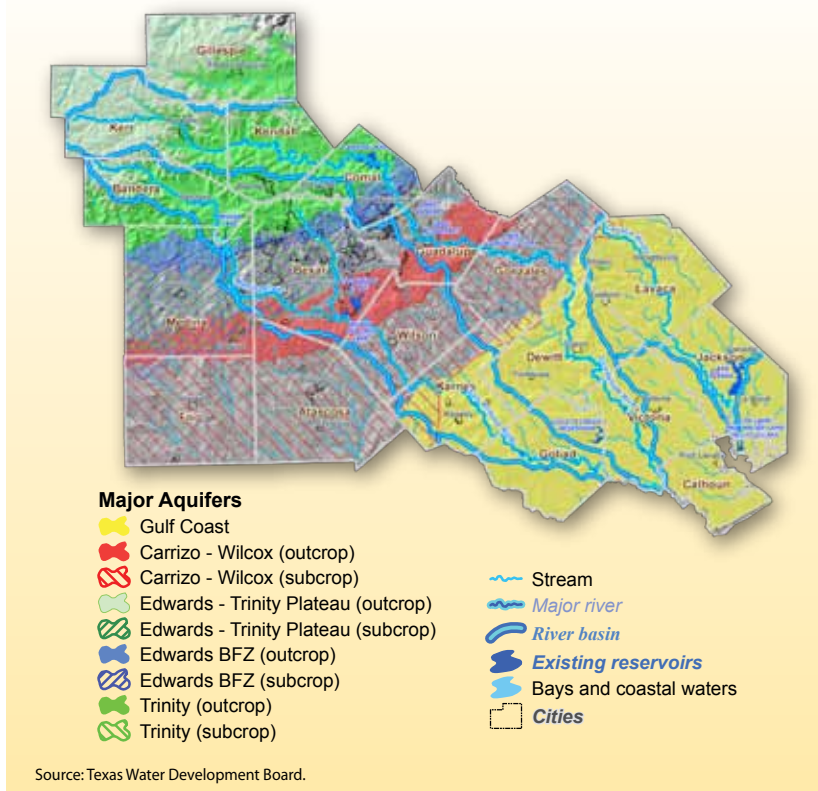
San Antonio, the region's largest city, historically has depended entirely upon water from the Edwards Balcones Fault Zone (BFZ) aquifer, but is seeking other supplies to reduce its draw on that source. (The Edwards BFZ aquifer is commonly called the Edwards aquifer, but is distinct from its neighbor, the Edwards-Trinity aquifer; references in this chapter to the "Edwards aquifer" mean the Edwards BFZ.) Meeting



Hill County State Natural Area, Medina River

PHOTO: Texas Parks and Wildlife

Exhibit 17

Alamo Region, Major Surface Groundwater Features

those demands will be among the region's top concerns in the coming decades.

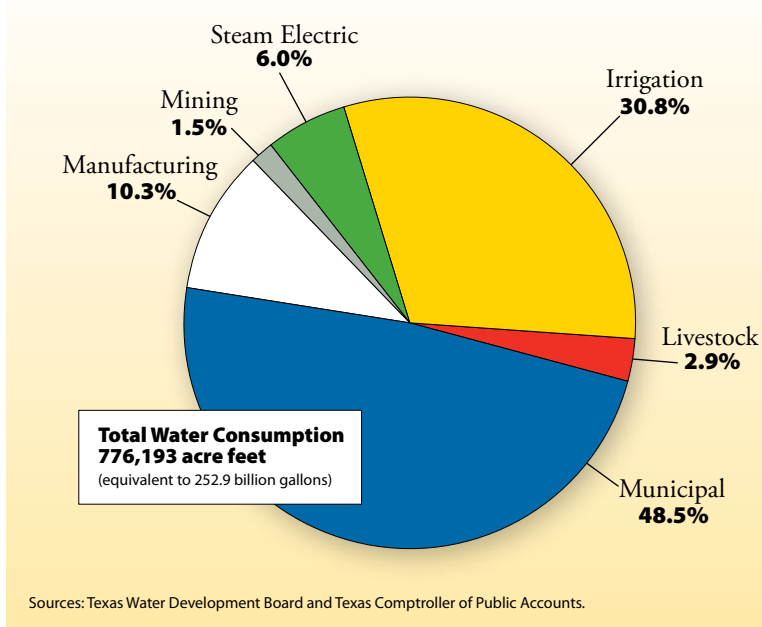
Annual rainfall in the Alamo region averages 25 inches annually in the Hill Country, gradually increasing to 40 inches along the Gulf Coast. Average annual maximum daily temperatures show very little variation from west to east, hovering between 76 and 78 degrees Fahrenheit. Statewide, average annual rainfall amounts range from 10 inches annually in far West Texas to 55 inches in the Beaumont/Port Arthur area, while average annual temperatures range from 70 degrees in the Panhandle to 82 degrees in South Texas.¹

Five major rivers and five major aquifers provided the region with some 776,193 acre-feet or about 252.9 billion gallons, in 2006, as estimated by the Texas Water Development Board (TWDB) using the most recent data available. (An acre-foot is the amount of water needed to cover an acre of land to a depth of one foot, or 325,851 gallons, about the annual consumption of two to three Texas households. A regulation Olympic-sized swimming pool holds about two acre-feet.)

The Colorado, Guadalupe, Nueces, San Antonio and Lavaca rivers provide the region with 26 percent of its total supplies, or almost 202,000 acre-feet. Five aquifers — the Gulf Coast, Carrizo-Wilcox, Edwards-Trinity Plateau, Edwards and Trinity — provide more than 574,000 acre-feet for a 74 percent share (**Exhibit 17**).

Municipalities consumed almost half (48.5 percent) of the region's water in 2006. Irrigation accounted for 30.8 percent of the remainder; manufacturing, 10.3 percent; steam-electric plants (which convert water to

Exhibit 18

Alamo Region, Total Water Use, 2006



Air Quality

The Texas Commission on Environmental Quality (TCEQ) monitors the air quality in the San Antonio metropolitan area, as well as at sites elsewhere in Bexar County and in nearby Comal and Guadalupe counties. TCEQ also has a monitor in Victoria. Each location's Air Quality Index (AQI) is calculated on a daily basis. According to TCEQ, the area's AQI scores typically fall in the "good" to "moderate" range; an AQI between 0 and 50 is good, while 51 to 100 is considered moderate.

The monitors in the San Antonio area, however, occasionally register diminished air quality, especially in hot weather, which exacerbates ozone problems. The AQI can climb into the "unhealthy for sensitive groups" range (101 – 150). Unsurprisingly, the monitors in smaller cities and towns in the Alamo region find good air quality on a more consistent basis, although Victoria does experience ozone pollution.²

Climate

The Alamo region generally shares the warm climate of the Texas Hill Country and coastal plains, with some variation. Counties in the region's northwest corner — Kerr, Gillespie and Kendall counties — usually experience their first freeze around Nov. 16, according to the *Texas Almanac*. Counties to the south and east have average first-freeze dates between December 1 and December 16, although Calhoun County, at the region's southern end rarely freezes. Similarly, the region's last freeze generally occurs between February 14 and March 1, but the last freeze can come in mid- or even late March in the northwestern counties.

Average lows in January range from 32°F in Kerr County (and slightly higher in Bandera and Kendall counties) to the mid-forties in Goliad and Victoria counties (and 47.9°F in Calhoun County). In July, average maximums range from 88.2°F in Calhoun County up to the mid-nineties in the region's southwest corner.

Average annual rainfall is lower in the southwest as well, with Frio County marking the region's low at 25.73 inches. In the east, Lavaca and Jackson counties receive more than 42 inches of rain per year, while the rest of the region's rainfall typically ranges between 30 and 40 inches.³

steam to produce electricity), 6 percent; livestock, 2.9 percent; and mining, 1.5 percent (**Exhibit 18**).

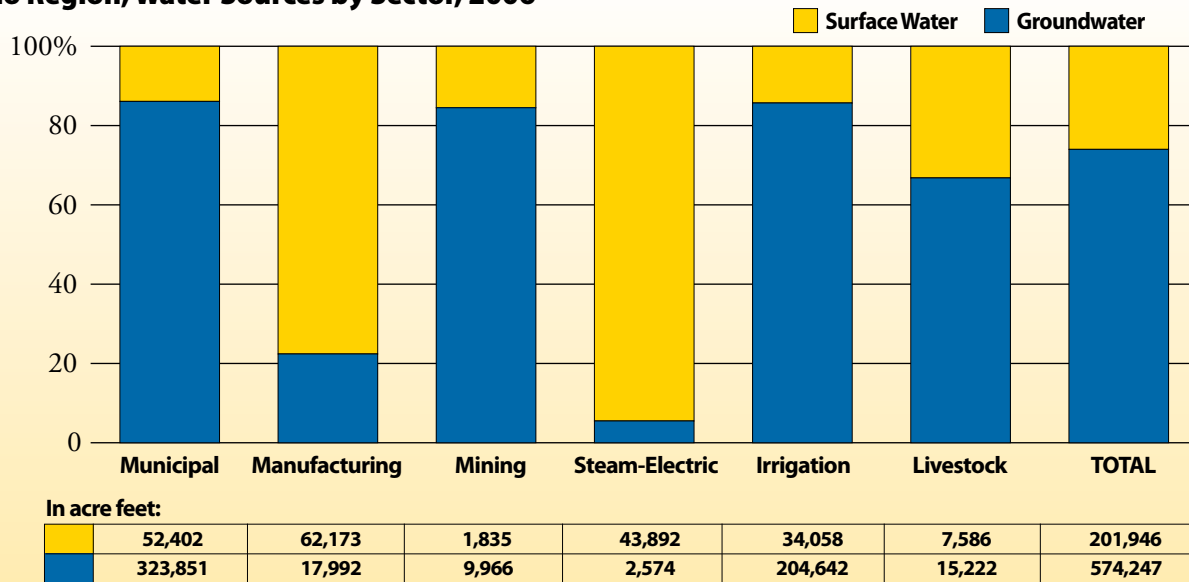
Groundwater — from underground streams, the water table and major and minor aquifers — is the Alamo region's most important source of water by far, supplying about 74 percent of it. The region's cities depend overwhelmingly on groundwater, which supplied 86.1 percent or 105.5 billion gallons of all the water they consumed in 2006. Mining and livestock uses also rely heavily on groundwater, at 84.5 percent and 66.7 percent of total usage from all supplies, respectively.

Conversely, manufacturing and steam-electric water consumers depended largely on surface water. The region's manufacturers received 77.6 percent or 20.3 billion gallons of their water from surface sources in 2006, while steam-electric uses consumed 14.3 billion gallons of surface water, which accounted for 94.5 percent of that industry's total water intake (**Exhibit 19**).⁴

In 1997, Texas Senate Bill 1 required TWDB to divide the state into 16 regions under the administration of regional water planning groups (RWPGs). The Alamo region contains all or portions of four of those RWPGs. Gillespie County is part of Region

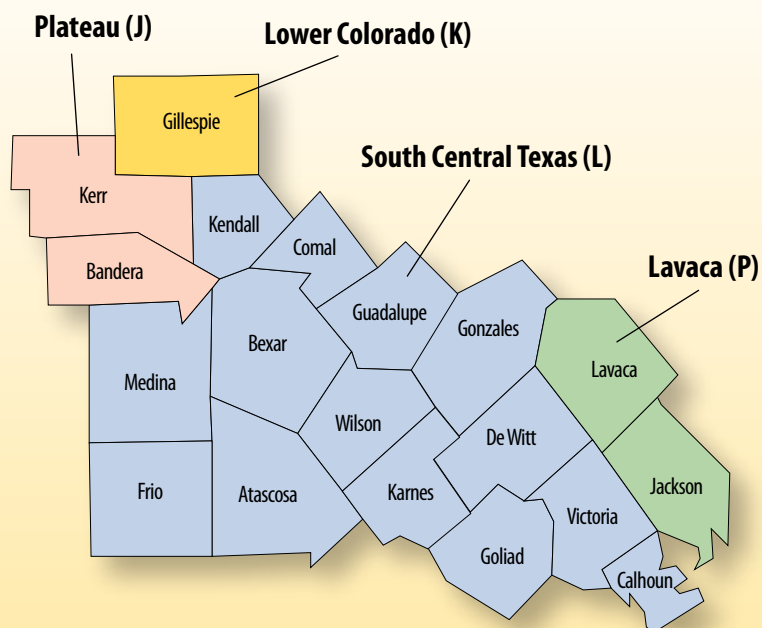


Exhibit 19

Alamo Region, Water Sources by Sector, 2006

Sources: Texas Water Development Board and Texas Comptroller of Public Accounts.

Exhibit 20

Alamo Regional Water Planning Areas

Source: Texas Water Development Board.

K (also known as the Lower Colorado region); Kerr and Bandera counties are in Region J (Plateau); Lavaca and Jackson counties comprise the entire Region P (Lavaca); and the remaining counties are part of Region L (South Central Texas) (**Exhibit 20**).⁵

SB 1 requires at least 11 stakeholder groups — such as agriculture, municipal, environmental and business interests, electric generating utilities, water districts and river authorities — to be represented on RWPGs. Each RWPG also may add other representatives at will.⁶ SB 1 requires RWPGs to evaluate their current water supplies and estimate their supplies and uses over a 50-year period; the current planning horizon extends to 2060. Based on 2000 data, the TWDB projects that the Alamo region's overall water use will rise by 36.7 percent to 1,185,400 acre-feet in 2060.

Irrigation is the only category of water use expected to decline by 2060, by 22.4 percent



to 287,787 acre-feet. Steam-electric use is expected to increase by 168.6 percent to 95,025 acre-feet, followed by large increases in manufacturing (79.4 percent growth in water use, to 179,487 acre-feet), municipal (78.3 percent, to 581,275 acre-feet) and mining uses (61.1 percent, to 17,197 acre-feet), with a minimal increase in livestock use (1.2 percent, to 24,629 acre-feet) (**Exhibit 21**).⁷

The expected increase in steam electric use, the largest among the major use categories, is attributable to Atascosa, Bexar, Goliad and Guadalupe counties, with smaller increases expected in Calhoun, Frio and Victoria counties. Many factors could explain the increase, according to TWDB, including the region's proximity to several fuel sources that lend themselves to electricity production as well as the general increase in the state's population and electricity needs.⁸

Surface Water

The Alamo region is blessed with many rivers and streams. The Hill Country counties — Bandera, Gillespie, Kendall and Kerr —

contain the headwaters for the Guadalupe and Medina rivers, while Bexar County is the source of the San Antonio River. The Colorado River flows southeast through the region's eastern counties, while the Lavaca River bisects Lavaca and Jackson counties. Springs from the Edwards aquifer in Comal County feed both the Guadalupe and Comal rivers.

Because of the region's high-volume river flows and generally gentle topography, it has little need or opportunity to build many reservoirs to store water. The region's 12 reservoirs were designed to contain 974,524 acre-feet water for industrial, municipal, irrigation, flood control and recreational uses. Over time, the lakes have filled somewhat with sediment, lowering their current conservation storage capacity to 913,510 acre-feet.

Exhibit 22 lists the region's seven major reservoirs. Three smaller lakes — Mud Lake No. 4, Cox Lake and Prudential Reservoir — are owned by corporations and used for industrial purposes only. The remaining two minor reservoirs — Lake McQueeney in

The Hill Country counties — Bandera, Gillespie, Kendall and Kerr — contain the headwaters for the Guadalupe and Medina rivers, while Bexar County is the source of the San Antonio River.

Exhibit 21

Alamo Region, Actual and Projected Total Water Use by Sector, 2000-2060 (acre-feet)

Sector	2000 Actual	2020 Projected	2040 Projected	2060 Projected
Irrigation	370,850	326,852	305,510	287,787
Livestock	24,335	24,629	24,629	24,629
Manufacturing	100,071	132,677	156,493	179,487
Mining	10,672	14,393	15,825	17,197
Municipal	326,062	422,828	505,800	581,275
Steam Electric	35,379	49,161	67,609	95,025
Total	867,369	970,540	1,075,866	1,185,400

Source: Texas Water Development Board.



Exhibit 22

Alamo Region, Major Lakes and Reservoirs

Reservoir/LakeName	River Basin	Year 2010 projected yield (acre-feet)	Conservation storage capacity (acre-feet)
Victor Braunig Lake	San Antonio	12,000	26,500
Calaveras Lake	San Antonio	37,000	63,200
Canyon Lake	Guadalupe	88,107	378,781
Coletto Creek Reservoir	Guadalupe	20,848	31,040
Lake Dunlap	Guadalupe	Hydroelectric power only	5,900
Lake Texana	Lavaca	74,500	153,246
Medina Lake	San Antonio	-	254,843
Total		232,455	913,510

Source: Texas Water Development Board.

Freshwater from the state's rivers flowing into bays and estuaries is critical to maintaining ecosystems that support the state's coastal fishing, shrimp, oyster and tourism industries.

Guadalupe County and Lake Gonzales in Gonzales County — have a combined conservation storage capacity of less than 12,000 acre-feet.⁹

The Alamo region narrows downstream to include only one of the state's many estuaries, San Antonio Bay. Freshwater from the state's rivers flowing into bays and estuaries is critical to maintaining ecosystems that support the state's coastal fishing, shrimp, oyster and tourism industries.

Groundwater

As noted above, the Alamo region's five major aquifers — the Gulf Coast, Carrizo-Wilcox, Edwards-Trinity Plateau, Edwards and Trinity — provide 74 percent of its water supply. These aquifers are water-bearing layers of permeable rock, sand or gravel. They can be shallow or deep, with waters that are fresh, brackish or saline (**Exhibit 23**).

Where the upper layers of an aquifer emerge on the surface of the land, in what hydrologists call an outcrop, springs result.

Several springs either create or contribute to many of the region's rivers; these include the San Marcos and Comal along the Balcones Escarpment, a geological formation of porous limestone following a semicircle from Kinney County in the west through Medina, Bexar and Comal counties northeastward to Travis County.

The Alamo region's dependence on groundwater, however, may be problematic because both TWDB and all regional planning groups anticipate a statewide reduction in groundwater supplies. TWDB projects that Texas' groundwater supplies, with current permits and infrastructure, will fall by 32 percent between 2010 and 2060. Although no projection data exists specifically for the Alamo region, regional planning groups collectively estimate that the state's groundwater supplies will fall by 22 percent over the same period.¹⁰

To manage and conserve groundwater resources, to which landowners may have extensive property rights, state law allows for



the creation of groundwater conservation districts (GCDs, sometimes abbreviated as GWCDs) to allow for some local control over groundwater pumping and export. GCDs generally follow county boundaries, but of course aquifers do not; every aquifer in Texas underlies multiple counties, which can make groundwater management complex and disjointed.

To provide for greater cohesiveness, state law requires TWDB, together with the Texas Commission on Environmental Quality (TCEQ), to create Groundwater Management Areas, or GMAs. Groundwater districts within GMAs must meet at least annually to develop mutually agreeable “desired future conditions” of the aquifers based on TWDB models and other hydrology information. Once an amount is determined, RWPGs within the GMA may use the data for planning, and GCDs may issue groundwater withdrawal permits within the amount of “managed available groundwater” determined by the GMA.¹¹

A unique state entity, the Edwards Aquifer Authority (EAA), manages the Edwards aquifer. EAA was created by the 1993 Texas Legislature to “manage, conserve, preserve and protect the aquifer” and to “increase recharge and prevent waste or pollution of the aquifer.” A 17-member EAA governing board includes 15 members elected from the region and two non-voting members appointed by local entities (**Exhibit 24**).¹²

Every county in the Alamo region except Calhoun is within either a GCD’s jurisdiction or that of the EAA (**Exhibit 25**).

The San Antonio Water System (SAWS) and other municipal water providers in the region

Exhibit 23

Alamo Region, Major Aquifers

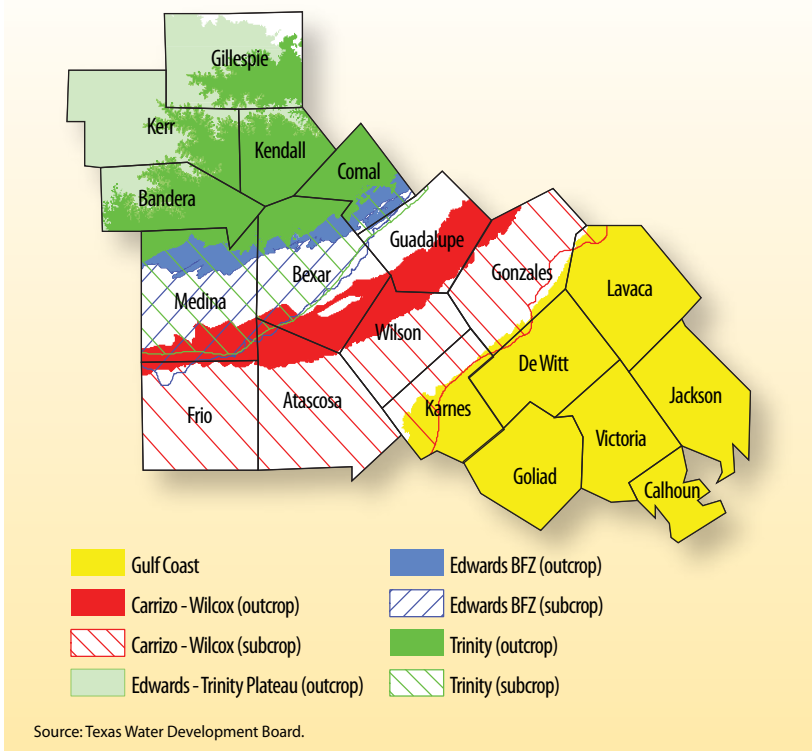


Exhibit 24

Edwards Aquifer

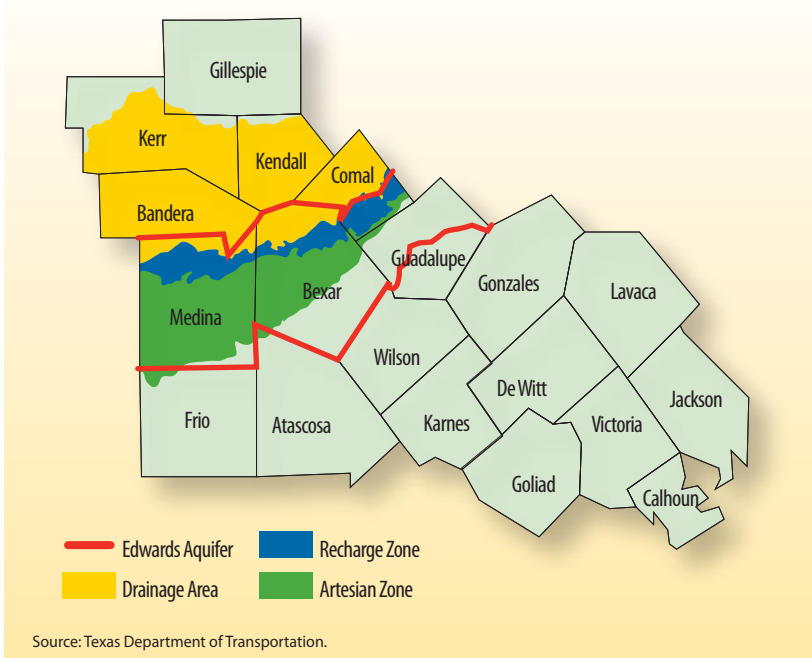
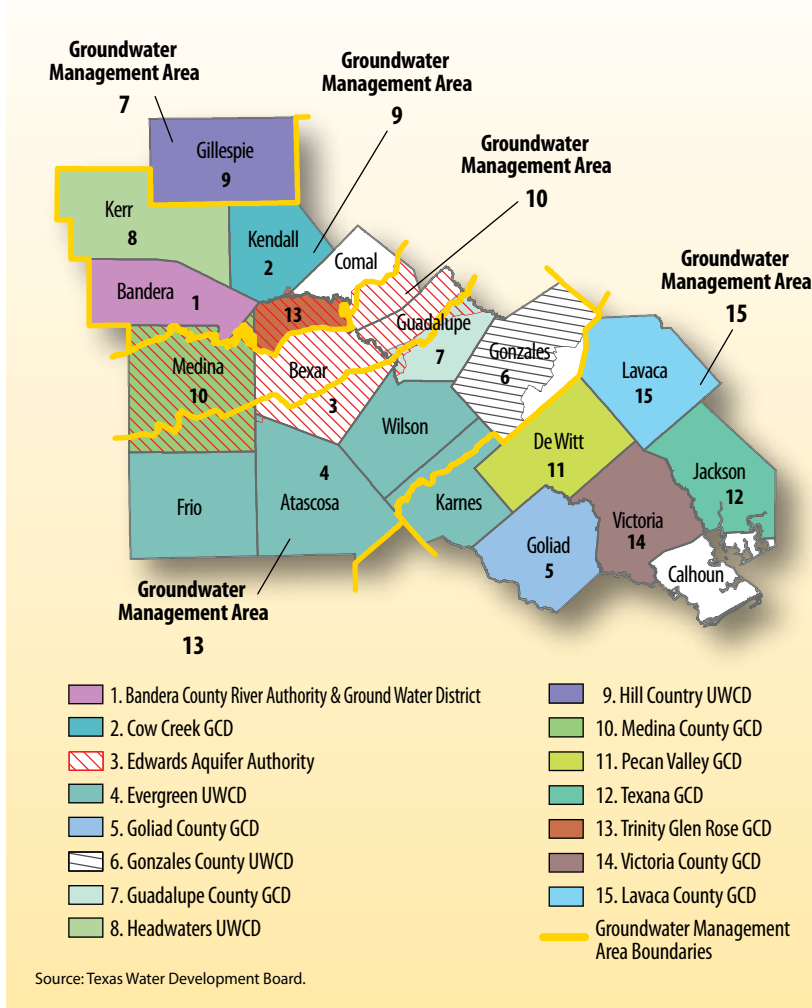


Exhibit 25

Alamo Region, Groundwater Conservation Districts and Groundwater Management Areas



are well aware of their dependence on the Edwards aquifer, and have worked hard both to conserve it and to find new supplies. In 1993, SAWS began an intensive conservation program by providing rebates for low-flow toilets, encouraging drought-tolerant landscapes and even restricting charity car washes to designated areas. According to environmental groups, SAWS customers have reduced their average daily water usage from 225 gallons per person in 1982 to 140 today, even though

SAWS estimates that the city's population rose by 50 percent over the same period.¹³ The city of San Antonio also implemented a drought ordinance in 2005 that could save 1.3 billion gallons of water annually.¹⁴

The city is also pursuing new, unconventional water sources. In July 2009, TWDB approved a \$35 million loan to San Antonio to help it begin developing a desalination facility that could treat water from a saline aquifer in the area and make it fit for human consumption.¹⁵

Transportation

The Texas Department of Transportation (TxDOT) builds and maintains the Texas highway system through local offices and alliances with contractors located around the state. TxDOT serves the Alamo region from office locations in San Antonio, Hondo, Kerrville, New Braunfels, Victoria and Karnes City. Highways in the region include the following:

- I-10, running west through Gonzales and Guadalupe counties, and into the heart of Bexar County, where it then heads northwest into Kendall, Gillespie and Kerr counties;
- I-35, running southwest through Comal, Bexar, Atascosa and Medina counties;
- Loop 410, a circle around San Antonio;
- I-37, running north from Atascosa County into Bexar County;
- State Highway 90, running parallel to I-10 through Gonzales, Guadalupe, Bexar and Medina counties;
- State Highway 281, running south through Comal, Bexar and Atascosa counties;



Military Bases and Base Realignment

San Antonio is home to several military bases, the largest being Fort Sam Houston. Fort Sam Houston, established in 1845, is famous for being the location of the very first military aircraft flight in 1910. It has also been called the “home of Army medicine” because it functions as headquarters for the Army’s medical command and because of its numerous medical training programs. Fort Sam Houston employs about 27,000, and its medical programs train more than 25,000 students annually.

Lackland Air Force Base, also in San Antonio, is one of four basic training centers for new Air Force recruits. Another Air Force base, Randolph, houses the only Air Force unit that offers pilot instructor training and combat systems officer training in the same location.¹⁶

In 2005, Congress enacted a federal Base Realignment and Closure (BRAC) program intended to reorganize the nation’s military installations to improve efficiency. Fort Sam Houston is undergoing a major expansion under this program. As part of the BRAC process, installation support functions at Sam Houston will team up with their counterparts at Randolph and Lackland Air Force bases to form a joint installation that will manage the largest hospital in the Department of Defense. This hospital, the San Antonio Military Medical Center, will serve as the training center for every newly enlisted military medic. Other planned projects include establishment of a clinical research center that also functions as a hospital and the creation of several management and command centers.

Fort Sam Houston’s expansion will add 12,502 positions at the base between 2006 and 2011. Although other San Antonio bases — Brooks City Base and Lackland Air Force Base — will lose positions during this period, San Antonio still will experience a net personnel increase of about 8,500. In all, Fort Sam Houston’s expansion due to BRAC will have a projected economic impact of \$8.3 billion, \$6.7 billion of that from new construction.¹⁷

- State Highway 181, running southeast from Bexar County through Wilson and Karnes counties;
- State Highway 87, running east from Bexar County to Wilson, Gonzales and DeWitt counties, and then heading southeast through Victoria and Calhoun counties;
- State Highway 183, running south from Gonzales County through DeWitt and Goliad counties;
- State Highway 77, running south through Lavaca and Victoria counties;
- State Highway 59, running southwest through Jackson, Victoria, and Goliad counties; and
- State Highway 57, branching off from I-35 and running west in Frio County.

Several of these highways are scheduled for repair, resurfacing and widening projects.

Exhibit 26 shows funded highway projects estimated to cost more than \$5 million, most of them in Bexar and Comal counties.

As **Exhibit 26** illustrates, some of the Alamo region’s largest projects will be funded through stimulus money released under the American Recovery and Reinvestment Act of 2009. An interchange at U.S. 281 and Loop 1604, located about 15 miles north of downtown San Antonio, is the region’s largest and most costly project, at nearly \$168 million. The interchange is intended to address traffic congestion occurring as a result of population growth in the northern part of the city. Numerous other, smaller-scale projects are also scheduled for the region’s transportation network.¹⁸



Exhibit 26

Alamo Region, Selected Highway Projects and Associated Costs

Highway or Road	County	Project Description	Estimated Project Cost	Funded by Stimulus
US 281	Bexar	Construct Interchange Direct Connection Ramp	\$167,969,760	✓
SH 46	Comal	Construct New Roadway Lanes	63,110,226	
LP 345	Bexar	Construct Bridge	24,588,147	
FM 3009	Comal	Construct Overpass/Underpass	23,743,019	
LP 1604	Bexar	Construct New Roadway Lanes	14,862,694	✓
US 183	DeWitt	Replace Bridge	10,696,288	
US 281	Bexar	Construct Intersection Improvements	9,520,555	✓
IH 35	Comal	Resurface Roadway	9,288,875	
FM 306	Comal	Rebuild Roadway	8,532,728	✓
IH 10	Bexar	Resurface Roadway	8,152,559	
SH 239	Goliad	Widen Roadway	7,030,987	
PR 37	Bandera	Widen Roadway	6,378,706	
IH 10	Guadalupe	Resurface Roadway	6,337,595	
US 59	Victoria	Repair Bridge	6,251,439	
FM 1099	Atascosa	Repair Roadway	5,789,694	
PR 37	Bandera	Widen Roadway	5,561,754	
IH 10	Bexar	Resurface Roadway	5,101,686	
FM 1681	Wilson	Widen Roadway	5,100,627	✓

Source: Texas Department of Transportation.

The region's 16,634 total lane miles make up 8.6 percent of state total lane miles.

The Alamo region's roadways make up a significant share of the state's transportation system. In all, the region has 6,698 center-line miles (miles traveled in a single direction regardless of the number of lanes), or about 8.4 percent of the state's total centerline miles. Similarly, the region's 16,634 total lane miles make up 8.6 percent of state total lane miles. The Alamo region has more than 2 million registered vehicles that travel about 48 million miles daily; across Texas, 21.2 million registered vehicles complete 488.8 million miles of travel daily (**Exhibit 27**).

Commuters in the Alamo region face longer commutes than those in other parts of the state; daily vehicle miles per capita averaged 33.2 for the region in 2008, versus 20.4 for the state as a whole.¹⁹

Trade Corridors, Railways and Ports

The Alamo region contains two major trade corridors, Interstate Highway 35 and Interstate Highway 10. I-10, which crosses eight states, facilitates east- and westbound traffic, while NAFTA-related trade between the U.S. and Mexico makes I-35 a key



Exhibit 27

Alamo Region, Highway Miles, Vehicle Miles Driven and Registered Vehicles, 2008

County Name	Centerline Miles	Lane Miles	Daily Vehicle Miles	Registered Vehicles
Atascosa	426	1,011	1,498,598	39,076
Bandera	196	415	381,130	25,087
Bexar	1,014	3,274	27,604,293	1,302,830
Calhoun	174	402	440,144	21,306
Comal	268	679	3,419,434	116,445
Dewitt	563	1,558	506,584	22,233
Frio	338	759	981,579	12,233
Gillespie	272	689	753,808	30,843
Goliad	249	505	363,131	8,354
Gonzales	409	880	1,121,766	21,569
Guadalupe	389	932	2,873,060	114,254
Jackson	293	636	872,774	16,495
Karnes	337	696	393,855	12,802
Kendall	194	453	960,771	46,134
Kerr	293	703	1,145,602	54,239
Lavaca	316	641	567,642	25,844
Medina	324	766	1,225,304	44,900
Victoria	311	890	2,013,194	86,137
Wilson	332	745	830,780	43,547
Region Total	6,698	16,634	47,953,449	2,044,328
Statewide Total	79,975	192,542	488,790,361	21,171,729

Source: Texas Department of Transportation.

According to San Antonio's metropolitan planning organization, trade-related traffic has boosted the city's economy by spurring a number of businesses to locate along I-10 and I-35.

corridor for north- and southbound freight traffic. San Antonio is located at the crossing of these two highways, making it a critical point for trade-related transportation.

Both highways channel significant amounts of traffic through and around San Antonio; the busiest stretches of I-10 serve an average of more than 200,000 vehicles per day, while daily traffic on I-35 averages between 107,000 and 186,000 vehicles per day.

According to San Antonio's metropolitan planning organization, trade-related traffic has boosted the city's economy by spurring a number of businesses to locate along I-10 and I-35. The trade routes also introduce challenges, however, such as increased congestion and pollution.²⁰

The Union Pacific Railroad dominates the Alamo region's rail lines, running through 13 of its 19 counties. Many lines run parallel



Exhibit 28

Alamo Region, Highways

Source: Texas Department of Transportation.

to highways, including I-10, I-35 and State Highway 37 (**Exhibit 28**).

Union Pacific has an intermodal terminal in San Antonio that allows for the transfer of freight between rail cars and trucks. The busiest rail corridor in the region runs parallel to I-35, passing through Frio, Medina, Bexar and Comal counties. This corridor links San Antonio with terminals in Laredo and Dallas and facilitates the movement of goods between the U.S. and Mexico.

Union Pacific's freight cars transport a mix of automotive, agricultural, industrial, chemical and energy products, with automotive goods making up the greatest share of trade volume at 40 percent.²¹

Distribution and Warehousing

As a nexus of major highways and freight rail lines, the San Antonio area offers a strategic location for retail warehouses and distribution centers. The area northeast of the city has attracted several large distribution-related developments. The cities of Seguin, New Braunfels and San Marcos are partnering to promote their area as an ideal distribution hub, centrally located between San Antonio, Austin and Houston.

In New Braunfels, a regional airport and 42 daily freight trains from San Antonio are spurring development. The city recently added two major distribution centers that should create 180 jobs. Wal-Mart has completed a 60,000 square-foot warehouse in New Braunfels behind its existing distribution center along I-35, which will provide 60 additional jobs. Ashley Furniture plans to build a distribution center nearby along I-35 to support expanded operations in South Texas, adding 120 jobs to the Alamo region.

Seguin looks forward to the completion of State Highway 130, connecting I-10 with the Austin area to boost commercial trucking needs. The city recently added a 224,300 square-foot warehouse facility that helped it attract a 500-acre development site with future retail, residential and industrial uses.

Another strategic highway location, the city of Schertz in Comal County, recently added a 308,000-square-foot Lack's Furniture distribution center. The center will provide nearly 280 jobs with an annual payroll of \$5 million, and will consolidate all Texas distribution for the company into one location. In addition, Lack's plans to add a 50,000 square-foot retail center in Schertz by 2010, providing more jobs and income.²²



The Alamo region also features passenger rail service. AMTRAK's Texas Eagle and Sunset Limited routes carry passengers between San Antonio, Austin, Dallas, Houston and other major cities. The Sunset Limited route extends from New Orleans all the way to Los Angeles, while the Texas Eagle runs from San Antonio to Chicago. Both lines make stops at AMTRAK's San Antonio station, making it the second-busiest in the state. In fiscal 2008, AMTRAK's San Antonio hub received 48,151 combined boardings and alightings. Only Fort Worth's passenger rail terminal saw more traffic in that year, while total AMTRAK boardings and alightings for all of Texas totaled 323,210 (**Exhibit 29**).²³

In addition to rail lines and highway trade corridors, the Alamo region contains Foreign Trade Zone 155, which stretches across Calhoun and Victoria counties and contains several ports used by chemical manufacturing industries. Foreign Trade Zones allow duty-free status for exported goods, creating a favorable environment for international trade.

The Port Lavaca and Point Comfort area, on the coast where Calhoun and Victoria counties meet, is an ideal location for trade because of its proximity to the Matagorda Ship Channel. Nearby companies manufacture chemicals, petrochemicals, aluminum ore and agricultural fertilizer and ship these goods to other countries. Cargo ship docks, barge terminals and storage facilities all contribute to the area economy. According to the Calhoun Port Authority in Point Comfort, marine terminals on the Matagorda Ship Channel support more than 16,000 jobs and almost \$2 billion in annual business revenues (**Exhibit 30**).²⁴

Exhibit 29

Alamo Region, Railways

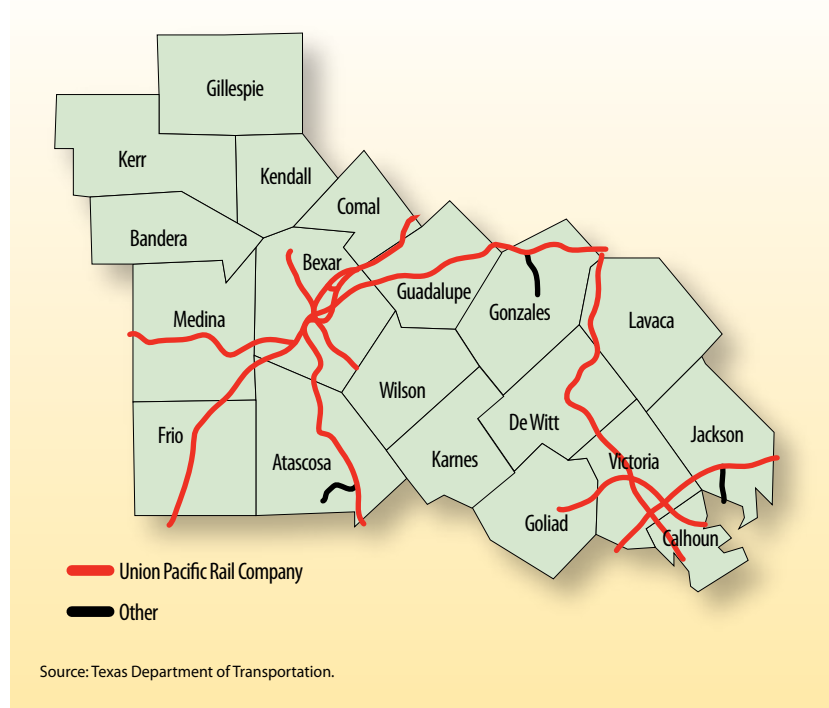
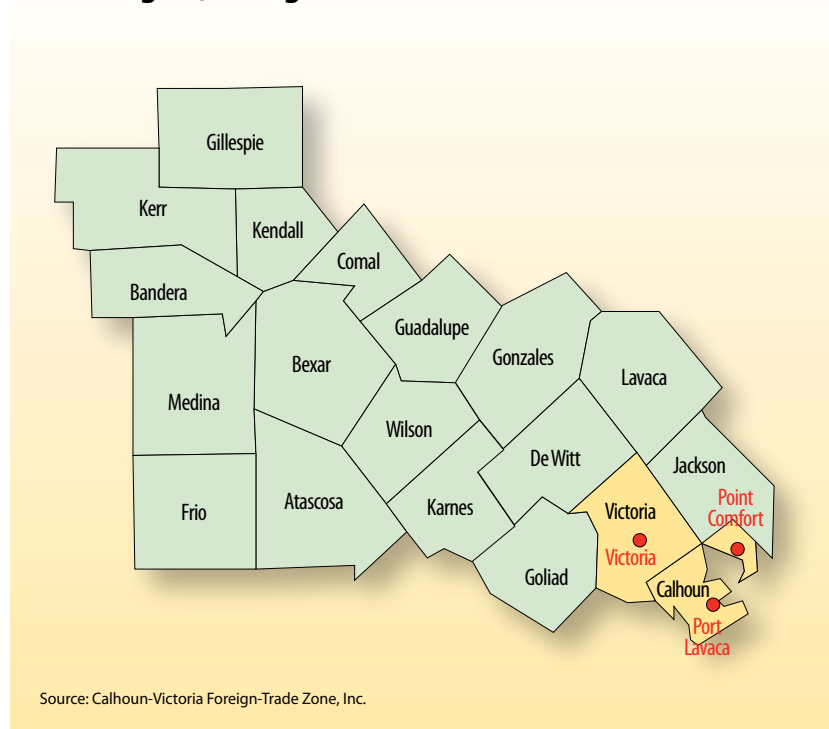


Exhibit 30

Alamo Region, Foreign Trade Zone





Public Transportation

Two transit agencies serve most residents in the Alamo region. VIA Metropolitan Transit serves San Antonio, while Alamo Regional Transit offers services in surrounding rural counties. Other transit agencies serve smaller cities such as Victoria and Seguin (Exhibit 31).²⁵

Airports

The Alamo region is home to two commercial airports, San Antonio International Airport and Victoria Regional Airport.²⁶ Located eight miles north of downtown San Antonio, 2,600-acre San Antonio International has two terminals served by airlines including Southwest, Delta, Continental, United, US Airways, American Airlines, AirTran, Skywest (operating under contract with Midwest), Mexicana, Frontier and AeroMexico. According to preliminary data, San Antonio International had more than 4 million passenger boardings in 2008, up from 3.9 million in 2007. Victoria Regional Airport, located northeast of the city of Victoria off of Highway 59, had

8,419 boardings in 2008, with Continental Connection providing flight service.²⁷ In addition to these two airports, the region has 23 non-commercial airports, several of them in San Antonio, and two air force bases.²⁸

Parks and Recreation

The Alamo region hosts several state and national parks and historic sites showcasing its scenic beauty and cultural heritage. The state parks with the most significant economic impact on the region are Goliad State Park and Historic Site, Guadalupe River State Park, Hill Country State Natural Area, Lost Maples State Park, Lyndon B. Johnson State Park and Historic Site, Palmetto State Park and Lake Texana (Exhibit 32). Goliad State Park and Historic Site, located just south of the town of Goliad along the San Antonio River, contains the Mission Espíritu Santo. Established in the 18th century, this mission housed Spanish *padres* who proselytized among the Karankawa Indians in the area. The 188-acre park was developed by the

San Antonio International Airport had more than 4 million passenger boardings in 2008, up from 3.9 million in 2007.

Exhibit 31

Alamo Region, Public Transit Authorities

Public Transit Authorities	Office Locations	Counties Served
Alamo Regional Transit	City of San Antonio	Atascosa, Bandera, Comal, Frio, Gillespie, Guadalupe, Karnes, Kendall, Kerr, Medina, Wilson
Community Council of South Central Texas	City of Seguin	Atascosa, Frio, Guadalupe, Karnes, Wilson
Dietert Public Transportation	City of Fredericksburg	Kerr
Medina County Public Transportation	City of Hondo	Bandera, Comal, Kendall, Medina
RTransit (Golden Crescent Regional Planning Commission, Victoria Transit)	City of Victoria	Calhoun, DeWitt, Goliad, Gonzales, Jackson, Lavaca, Victoria
VIA Metropolitan Transit	City of San Antonio	Bexar

Source: American Public Transportation Association.



Civilian Conservation Corps (CCC) in the 1930s. Although it is relatively small, Goliad State Park offers a variety of activities including camping, boating and hiking as well as a Junior Olympic-sized swimming pool. In fiscal 2008, Goliad State Park had about 51,000 visitors.²⁹

Guadalupe River State Park in Comal and Kendall counties, about 30 miles north of downtown San Antonio, consists of about 1,939 acres open to the public since 1983. The park showcases the Texas Hill Country and includes four miles of frontage along one of Texas' most scenic and popular rivers. Popular activities include camping, tubing, canoeing, and fishing for the Guadalupe bass, the state fish of Texas. Guided tours are also available to the adjacent, restricted Honey Creek State Natural Area. In fiscal 2008, Guadalupe River State Park had more than 164,000 visitors.³⁰

Hill Country State Natural Area is located in Bandera and Medina Counties, about 20 miles

southwest of the city of Bandera. In keeping with its original deed when the Merrick Bar-O Ranch donated the park to the state, the Texas Parks and Wildlife Department (TPWD) has made only minimal changes to the land. The 5,370-acre park is largely unimproved aside from an impressive 40-mile network of multi-use trails. Its rugged natural settings are perfect for backpackers, horseback riders, campers, mountain bikers and others who want to experience the Hill Country. Dude ranches and outfitters in the area offer horse rentals and rides. In fiscal 2008, Hill Country State Natural Area had about 25,000 visitors.³¹

Located in Bandera and Real Counties, Lost Maples State Natural Area is a site made famous by its stand of Bigtooth Maples, a uniquely isolated collection that exists well to the east of most other Bigtooth Maple populations in the U.S. The park is especially popular in the autumn, when the trees change color to a vibrant mix of red, orange and yellow. The

Lost Maples State Natural Area is a site made famous by its stand of Bigtooth Maples, a uniquely isolated collection that exists well to the east of most other Bigtooth Maple populations in the U.S.

Enchanted Rock

The 1,644-acre Enchanted Rock State Natural Area (SNA) lies in Llano and Gillespie counties. Enchanted Rock SNA was created from land purchased by the Nature Conservancy in 1978, to be held until TPWD could acquire it. In 1984 the area opened and Enchanted Rock was placed on the National Register of Historic Places, having already been named a National Natural Landmark in 1970.

Enchanted Rock is a huge granite dome rising 425 feet above ground level to an altitude of 1,825 feet. The rock itself covers 640 acres and is a surface expression of the Enchanted Rock Batholith, an enormous mass of igneous rock that intruded into sub-surface rock layers more than a billion years ago.

The Tonkawa and Comanche Indians long considered the dome a spiritual and even haunted place, with ghostly fires on its summit and groans and screams heard in the night. Some believe that the Spanish explorer Cabeza de Vaca was the first European to see Enchanted Rock, when he was in Texas in the early 1500s. Throughout its history, Enchanted Rock has been surrounded by legends of escaped prisoners, embattled warriors, suicide, gold and doom.

Today, tens of thousands of visitors come to hike to its summit, camp and practice technical rock climbing. Especially popular in the spring and fall months, the park frequently reaches its (parking) capacity before noon on weekends and closes to additional visitors until later in the day. Clearly, Enchanted Rock continues its very long history of enchantment even now.³²



park also offers visitors a scenic collection of hills, canyons and springs that can be viewed along 11 miles of hiking trails. Birders are attracted to the park by the black-capped vireo and golden-cheeked warbler, among other birds. The park offers both developed campsites with RV facilities and primitive back-country sites. In fiscal 2008, Lost Maples State Natural Area had close to 63,000 visitors.³³

Lyndon B. Johnson State Park and Historic Site in Gillespie County sits along the Pedernales River, adjacent to the LBJ Ranch and Lyndon B. Johnson National Historical Park. Known as the “Texas White House” during the Johnson administration, President and Lady Bird Johnson lived here for many years. During his presidency, Johnson hosted political figures from the United States and around the world at his ranch. The Johnsons donated their ranch to the National Park Service in 1972, although Mrs. Johnson lived at the ranch until her death in 2007.

Today, the National Park Service offers a self-guided driving tour of the ranch. LBJ State Park offers a variety of recreational opportunities, including a visitor center and a museum with educational displays and memorabilia related to the Johnson presidency. The park also features the Sauer-Beckmann Farmstead, a working farm and living history exhibit with re-enactors who demonstrate what life was like on the frontier in the early 20th century. LBJ State Park also allows visitors to stroll along nature trails, view a herd of Longhorn cattle and go for a swim in the public swimming pool. In fiscal 2008, Lyndon B. Johnson State Park and Historic Site had more than 80,000 visitors.³⁴

Palmetto State Park, located near the town of Gonzales in Gonzales County, is a 270-acre park on the San Marcos River that originally opened in 1936. The park’s unusual marsh and forest ecology is unique in this region of the state. It is home to one

In fiscal 2008, Lyndon B. Johnson State Park and Historic Site had more than 80,000 visitors.

Exhibit 32

Alamo Region, Economic Impact of State Parks

Name	Number of Visitors 2008	2006 Total Economic Impact on Sales	2006 Spending by Visitors
Enchanted Rock State Park	185,000	\$5,920,000	\$3,860,000
Goliad State Park	51,000	1,110,000	410,000
Guadalupe River State Park/ Honey Creek State Natural Area	164,000	2,370,000	1,200,000
Hill County State Natural Area	25,000	710,000	350,000
Lost Maples State Natural Area	63,000	1,670,000	1,050,000
Lyndon B. Johnson State Historic Site	80,000	33,100,000	22,160,000
Palmetto State Park	43,000	1,180,000	650,000
Lake Texana State Park	50,000	1,340,000	1,060,000
Government Canyon State Natural Area	27,000	n/a	n/a
Sebastopol House State Historic Site	3,000	n/a	n/a

Note: Economic data were not available for Government Canyon State Natural Area, Honey Creek State Natural Area or Sebastopol House State Historic Site.
Sources: Texas A&M University and Texas Parks and Wildlife Department.

of the westernmost stands of dwarf palmetto in the U.S. and is a hotspot for birds and other wildlife.

The park also features attractive stone buildings constructed by the CCC in the 1930s. Visitors can rent pedal boats and canoes and set out on the placid San Marcos River. The park also offers camping and picnicking facilities. In fiscal 2008, Palmetto State Park and Historic Site had more than 43,000 visitors.³⁵

Lake Texana State Park, 6.5 miles east of the town of Edna in Jackson County, sits on the 11,000-acre Lake Texana reservoir. The reservoir, which is fed by the Navidad River, attracts visitors who enjoy boating, water skiing, sailing, canoeing and fishing for bass, crappie, catfish and other species. The park also has picnic areas, campsites, a nature trail and an interpretive center. In fiscal 2008, Lake Texana State Park had about 50,000 visitors.³⁶

In addition to these parks and natural areas, the Alamo region is also home to the Government Canyon State Natural Area in

Bexar County, the Sebastopol House State Historic Site in Seguin and the Kerrville-Schreiner Park in Kerrville, which is operated by the city of Kerrville.

Recreational Lakes and Reservoirs

The Alamo region has several lakes offering recreational activities such as boating and fishing. **Exhibit 33** describes the region’s lakes and reservoirs.

Hunting and Fishing

In 2008, hunting and fishing enthusiasts in the Alamo region purchased almost 271,000 licenses from TPWD, at a cost of more than \$10 million.³⁷ All revenue collected from the sale of hunting and fishing licenses goes to a dedicated state fund supporting the regulation and conservation of the state’s fish and wildlife.

Every county in the region offers legal hunting of some sort, and several offer hunting year-round (**Exhibit 34**).

(text continued on Page 73)

In 2008, hunting and fishing enthusiasts in the Alamo region purchased almost 271,000 licenses from TPWD, at a cost of more than \$10 million.

Exhibit 33

Alamo Region, Recreational Lakes and Reservoirs

Name	Location	Size	Average/ Maximum Depth
Victor Brauning Lake	17 miles south of San Antonio	1,350 acres	50 feet
Calaveras Lake	20 miles south of San Antonio	3,624 acres	45 feet
Lake Texana	8 miles east of Edna	9,727 acres	58 feet
Lake McQueeney	7 miles east of New Braunfels	396 acres	40 feet
Lake Placid	1/2 mile southwest of Seguin	198 acres	40 feet
Lake Gonzales	12 miles east of Gonzales	696 acres	n/a
Canyon Lake	16 miles northwest of New Braunfels	8,308 acres	125 feet
Medina Lake	40 miles northwest of Bandera	5,426 acres	152 feet

Source: Texas Parks and Wildlife Department.



Exhibit 34

Alamo Region, Applicable Hunting Regulations

Animal	Season
White-tailed Deer	In Atascosa, Calhoun, Frio and Medina counties, open season lasts from November 7 until January 17. In the Alamo Region's other counties, open season lasts from November 7 until January 3. Several counties in the region also have a special late season in January. Archery season lasts from October 3 until November 6. A special youth-only season occurs from October 31 until November 1.
Javelina	North Zone: October 1 – February 28. South Zone: September 1 – August 31.
Squirrel	Squirrel season is open year-round with no limit.
Turkey	Fall Season – North Zone: November 7, 2009 – January 3, 2010; South Zone: November 7, 2009 – January 17, 2010 Spring Season - North Zone: April 3 – May 16, 2010 South Zone: March 20 – May 2, 2010 Archery season lasts from October 3 – November 6. Special youth-only season occurs twice a year on October 31 – November 1, 2009 and January 16-17, 2010
Quail	Open season lasts from October 31 until February 28. Daily bag limit: 15; possession limit: 45.
Dove	Some of the region is in the special White-winged Dove Area where the regular seasons last from September 18 until November 3 and December 26, 2009 until January 13. For the remainder of the region, the season for dove is as follows: Central Zone: September 1 – October 25 and December 26 – January 9. South Zone: September 18 – November 3 and December 26 – January 17.

Source: Texas Parks and Wildlife Department.

Victoria County Nuclear Project

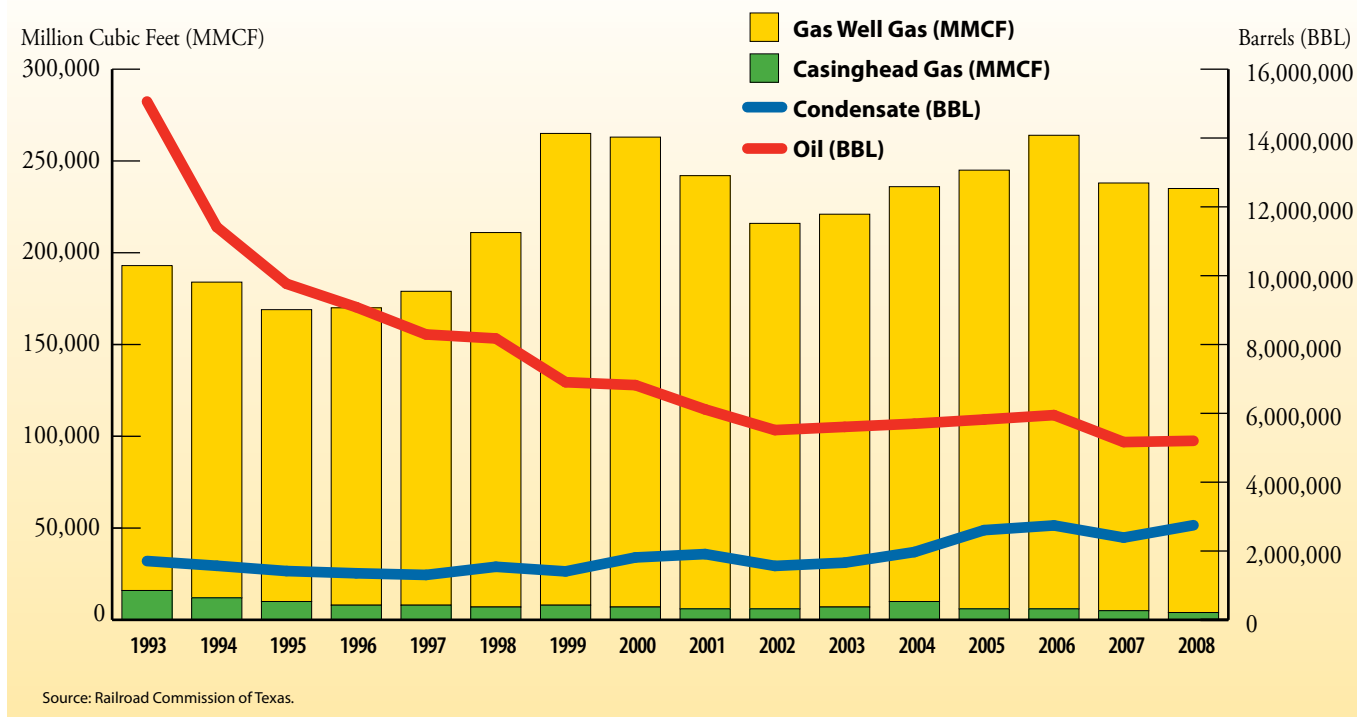
Exelon, the nation's largest electric and gas utility, has made tentative plans to build a nuclear power plant in the Alamo region. In June 2009, the company announced it would apply for an early site permit for a proposed plant in Victoria County. In deciding whether to approve the permit, the federal Nuclear Regulatory Commission will closely examine the company's plans for the facility, a process that can take several years. Once the early site permit is approved, the company then must apply for a construction and operating permit.

Exelon's plans for the facility call for two nuclear reactors that would produce a combined total of 3,000 megawatts, enough energy to power nearly 1.9 million Texas homes. A timeline for the proposed project has not been set. Initially, the company planned to make an announcement in 2010, but it has delayed its plans due to difficult economic conditions and insufficient federal funding.

If constructed, the facility would have a significant effect on the regional economy. Its construction would create 6,300 temporary jobs and permanent jobs for about 800 employees. The proposed plant would be located on 11,500 acres 13 miles south of the city of Victoria.³⁸



Exhibit 35

Alamo Region, Oil and Gas Production, 1993-2008

The Alamo region also features abundant freshwater fishing opportunities in its rivers and lakes. Prevalent species in the region include bass, crappie, catfish, sunfish and redfish.

Energy

Fifteen of the region's 19 counties produce oil and gas. In 2008, they produced 5.2 million barrels of oil, 4.4 billion cubic feet of casinghead gas (a mixture of unrefined gases that can include methane, butane and propane), 232 billion cubic feet of natural gas (gas well gas) and 2.7 million barrels of condensate (natural gas liquids). Atascosa, Calhoun, DeWitt, Guadalupe and Jackson counties led the region in energy production (**Exhibit 35**).³⁹

The Texas Railroad Commission (RRC) is the state's oil and gas regulatory agency. RRC has 12 district offices; the northwestern section

of the Alamo region is in RRC district 1, while its southeastern section is in RRC District 2.

Bexar and Medina counties once produced lignite coal along and south of the Balcones Fault in "trends," or subsurface formations, known as the Claiborne and Jackson Group.⁴⁰ Most coal produced in Texas is consumed on site to provide electricity (in what are called "mine mouth" operations). Today, Atascosa County is the region's only county producing coal, according to the U.S. Energy Information Administration. In 2007, one surface mine produced 3.1 million short tons.⁴¹ (A short ton is 2,000 pounds.)

Electricity

Natural gas is the fuel of choice for most of the Alamo region's electricity generation facilities built since 1995. The region has 13

Fifteen of the region's 19 counties produce oil and gas.



Exhibit 36

**Alamo Region, Municipally Owned Utilities
and Member-Owned Cooperatives*****Municipally Owned Utilities***

Entity Name	Counties in Service Area
City Public Service	Bexar
Cuero Electric Utility	DeWitt
Fredericksburg Electric Utility	Gillespie
Gonzales Electric System	Gonzales
Hondo Electric System	Medina
Kerrville Public Utility Board	Kerr
New Braunfels Utilities	Comal
Seguin Electric System	Guadalupe

Member-Owned Cooperatives

Entity Name	Counties in Service Area
Bandera Electric Cooperative	Bandera, Bexar, Kendall, Kerr, Medina, Real, Uvalde
Bluebonnet Electric Cooperative	Austin, Bastrop, Burleson, Caldwell, Colorado, Fayette, Gonzales, Guadalupe, Hays, Lee, Milam, Travis, Washington, Williamson
Central Texas Electric Cooperative	Blanco, Gillespie, Kendall, Kerr, Kimble, Llano, Mason, McCulloch, Menard, Real, San Saba
Fayette Electric Cooperative	Austin, Bastrop, Colorado, Fayette, Lavaca, Lee, Washington
Guadalupe Valley Electric Cooperative	Bexar, Caldwell, Comal, DeWitt, Fayette, Goliad, Gonzales, Guadalupe, Jackson, Karnes, Lavaca, Victoria, Wilson
Jackson Electric Cooperative	Brazoria, Calhoun, Jackson, Lavaca, Matagorda
Karnes Electric Cooperative	Atascosa, Bee, Bexar, DeWitt, Frio, Goliad, Karnes, LaSalle, Live Oak, McMullen, Medina, Wilson
Medina Electric Cooperative	Atascosa, Brooks, Dimmitt, Duval, Edwards, Frio, Jim Hogg, Kinney, LaSalle, McMullen, Medina, Real, Starr, Uvalde, Webb, Zapata, Zavala
Pedernales Electric Cooperative	Bell, Bexar, Blanco, Burnet, Caldwell, Comal, Edwards, Gillespie, Guadalupe, Hays, Kendall, Kerr, Kimble, Kinney, Lampasas, Llano, Mason, Menard, Real, San Saba, Schleicher, Sutton, Travis, Williamson
San Patricio Electric Cooperative	Aransas, Bee, Goliad, Jim Wells, Live Oak, McMullen, Nueces, Refugio, San Patricio
Victoria Electric Cooperative	Calhoun, DeWitt, Goliad, Jackson, Refugio, Victoria

Sources: Public Utility Commission of Texas, Texas Electric Cooperatives.



electricity generation plants with a combined generating capacity of 4,569 megawatts (MW) operating or under construction — six in Bexar County, two in Calhoun County, one in Frio County, two in Guadalupe County and two in Victoria County. Nine of these plants use natural gas as a fuel; two use coal; one uses landfill gas, a renewable resource; and one, an industrial facility, uses petroleum coke.⁴²

The entire Alamo region lies within the boundaries of the Electric Reliability Council of Texas (ERCOT), the electric grid system that manages the electricity needs of 22 million Texans. ERCOT's grid covers 75 percent of the state's land area and carries 85 percent of its electric load.⁴³

According to ERCOT, in summer 2009 the region had a total generation capacity of 7,338 MW. ERCOT estimates that capacity will rise to 8,483 MW by 2011, as new plants open.⁴⁴

Perhaps reflecting the Alamo region's rural past, electrical providers in the area include eight municipally owned utilities and 11 electric cooperatives (**Exhibit 36**).⁴⁵

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Health Care

Health care plays an important role in the economy of the Alamo region, particularly in the San Antonio metropolitan area. The greater San Antonio area is home to 24 of the region's 47 hospitals, the University of Texas Health Science Center at San Antonio and two U.S. military medical centers. A 2007 study found that about one out of every seven San Antonio employees works in the health care and biosciences industries, with 80 percent of those jobs in the health services sector (which includes

hospitals, medical personnel, nursing homes and other specialty providers). Health services accounted for about \$9.9 billion of economic activity in 2007.¹

Health care challenges in the Alamo region include a lack of insurance and a shortage of health care providers in some areas. In addition, the region's obesity and diabetes rates are higher than the state average — which is higher than the national average.

Health Care Infrastructure

Major medical facilities play a substantial economic role in the Alamo region. In San Antonio, the sprawling South Texas Medical Center covers 900 acres and employs some

In San Antonio, health services accounted for about \$9.9 billion of economic activity in 2007.



UT Health Science Center, San Antonio

PHOTO: UTHSCSA



25,000 people. Fourteen percent of all employees in San Antonio work in the medical field.²

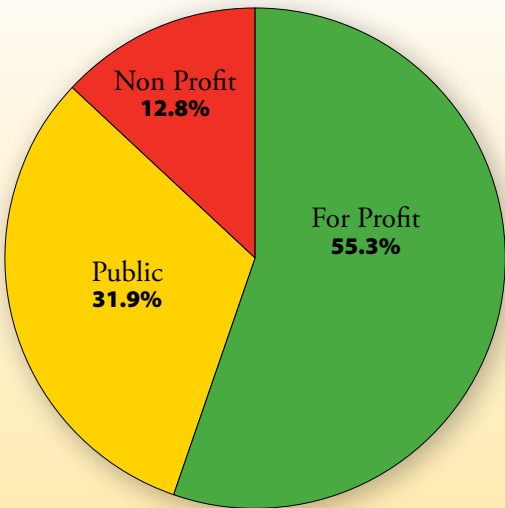
The Alamo region has 26 for-profit hospitals, six nonprofit hospitals and 15 public hospitals (**Exhibit 37**). San Antonio accounts for 24 of these, including three public hospitals —University Hospital (part of the

University Health System), the Texas Center for Infectious Disease and San Antonio State Hospital — two nonprofit and 19 for-profit hospitals. Victoria has the next highest number of hospitals at four.³

San Antonio has the region’s largest number of acute-care beds — 6,384 beds for patients receiving short-term medical care at a hospital or other facility. Baptist Medical Center in San Antonio is the region’s largest, with 1,742 beds. Methodist Hospital is the next largest, with 1,733 acute-care beds, followed by CHRISTUS Santa Rosa Hospital with 978 acute-care beds. Victoria has the next-largest number of acute beds at 701. In 2008, the region’s hospitals had a total of 8,696 staffed beds (7,980 acute-care beds and 716 psychiatric beds).⁴

Exhibit 37

Alamo Region Hospital Ownership, 2008



Source: Texas Department of State Health Services.

The Alamo region also has 11 hospital districts (**Exhibit 38**). Hospital districts are authorized to levy taxes within their jurisdictions for the support of health care and hospital services. Once approved by the voters, a hospital district can levy property and sales taxes.⁵

Exhibit 38

Alamo Region Hospital Districts

County	Hospital District Name
Bexar	University Health System
DeWitt	DeWitt Medical District #1, Yoakum Hospital District
Frio	Frio Hospital District
Gonzales	Gonzales County Hospital District, Nixon Hospital District
Jackson	Jackson County Hospital District
Karnes	Karnes County Hospital District
Lavaca	Lavaca County Hospital District
Medina	Medina County Hospital District
Wilson	Wilson County Hospital District

Source: Texas Department of State Health Services

In June 2009, Medina County voters voted to create the Medina County Hospital District in Hondo. The district’s property tax rate is expected to be capped at 5 percent for its first year, according to its authority board.⁶

Three of the region’s 19 counties, Bandera, Goliad and Kendall counties, do not have a hospital (**Exhibit 39**).⁷ Bandera County does have an emergency medical services unit, which provides ambulatory services for the county.⁸ Kendall County also has an emergency medical services unit, the Methodist Boerne Medical Center, which provides pre-hospital patient care, including basic trauma care and life support.⁹ San Antonio’s



Methodist Healthcare opened the Methodist Boerne Medical Center in 2008. It is the area's first freestanding emergency department, giving residents of Kendall County immediate and direct access to emergency room services.¹⁰

These two counties also provide indigent health care services. The state, through its Department of State Health Services, supports a County Indigent Health Care Program. The Program provides services to indigent residents through local entities like hospital districts and public hospitals.¹¹ Bandera County's program provides services to individuals who are not currently eligible for state or federal assistance and who meet an income limit of 21 percent of the federal poverty income level for a family of one. The program covers general medical services such as physician exams, physicals and immunizations as well as prescriptions and x-rays.¹² Kendall County also provides indigent health care services designed solely to assist in the payment of medical services.¹³

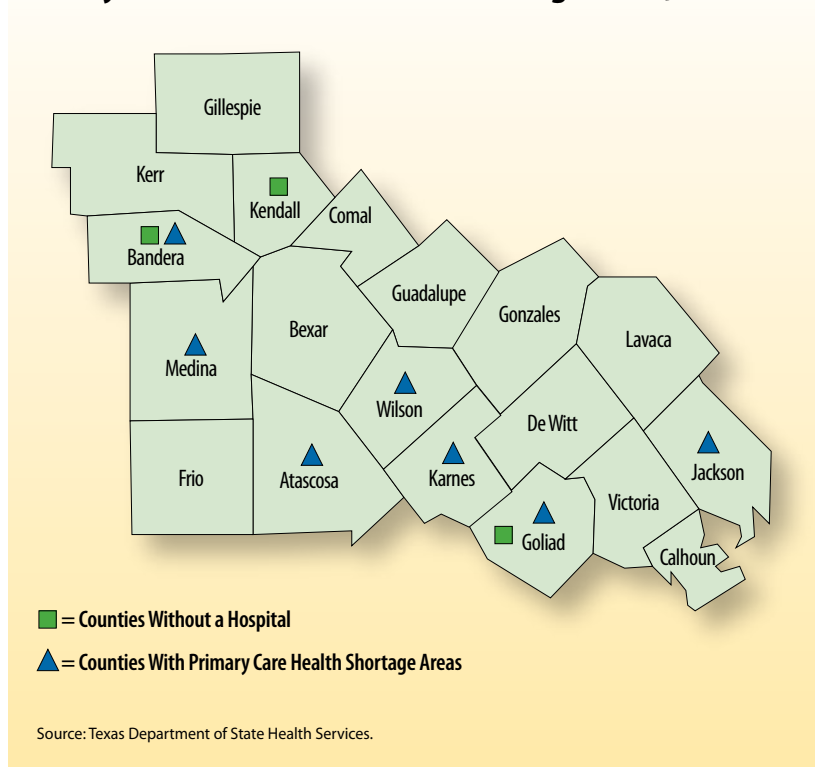
Upcoming Projects

A number of major health care projects are under way in the Alamo region. San Antonio's University Hospital recently received approval from the Bexar County Commissioners Court to expand its Level 1 trauma center. Level 1 centers are designed to handle patients with serious and complex injuries; at present, Texas has only 13 of them.

The University Hospital Level 1 trauma center was last expanded 25 years ago and is too small to meet the current needs of the city's population or to treat all of those involved in any major emergency. University

Exhibit 39

Alamo Region Counties Without a Hospital, 2008 and Primary Care Health Professional Shortage Areas, 2009



Hospital also anticipates ongoing updates of its other facilities including an expansion of its emergency center; a redesign of inpatient and adult rooms last updated in 1968; and additional parking spaces.¹⁴

The recent federal stimulus legislation provides funding for 30 research projects at the University of Texas Health Science Center at San Antonio (UTHSCSA). The largest fund award will support a study examining interventions to reduce sexually risky behavior among Mexican-American adolescent women in rural areas.¹⁵ The project's funding exceeds \$500,000. Other UTHSCSA projects funded under the stimulus bill include a clinical trial of treatments for advanced solid

(text continued on Page 83)



UT Health Science Center

The University of Texas Health Science Center at San Antonio (UTHSCSA) plays a significant role in the city's \$16.3 billion health care and bioscience industry. UTHSCSA offers more than 70 health science-related degree specialties, provides patient health care and community services and engages in biomedical research. In San Antonio alone, UTHSCSA employs about 5,900 faculty and staff members that earn roughly \$329 million annually.¹⁶

UTHSCSA's service area extends well beyond San Antonio, covering 50,000 square miles of South Texas all the way to the border. UTHSCSA has six campuses — three in San Antonio, one in Laredo, one in Harlingen and one in Edinburg. The Health Science Center's combined economic impact on San Antonio and South Texas is nearly \$1.3 billion annually.¹⁷

The 1959 Texas Legislature created UTHSCSA, originally called the South Texas School of Medicine; it admitted its first class of 15 medical students in 1966. In 1969, the Legislature authorized the addition of a dental school, followed by the School of Nursing in 1970 and the School of Allied Health Sciences and Graduate School of Biomedical Sciences in 1972.¹⁸ About 3,200 students were enrolled at UTHSCSA in 2008. Since its inception, it has graduated 24,000 health professionals, most of them now working in the South Texas region.¹⁹ Every year, UTHSCSA produces about 200 new physicians and trains about 700 residents.²⁰

UTHSCSA is also a major provider of patient health care. Every year, its faculty, residents and students treat more than a million patients and provide about \$100 million in charity care to the uninsured and underinsured.²¹ Health care services are provided at the Health Science Center's UT Medicine— a multispecialty faculty practice group — and its Cancer Therapy and Research Center, as well as through various partnerships and affiliations. In Bexar County and San Antonio, UTHSCSA partners with the University Health System and the South Texas Veterans Health Care Systems, and is affiliated with CHRISTUS Santa Rosa Health Care and other facilities.

UTHSCSA grew rapidly between 2000 and 2008 and continues to expand, serving as "the chief catalyst for the \$16.3 billion bioscience and health care sector in San Antonio's economy."²² Its research expenditures increased from \$84 million in 2000 to \$210 million in 2008; awards from the National Institutes of Health rose from \$51 million to \$107 million; and its annual budget went from \$351 million to \$668 million.²³

In summer 2009, UTHSCSA began opening a new, \$100 million Medical Arts and Research Center (MARC) as the new home of the School of Medicine multispecialty faculty practice group. Eight of UTHSCSA's research and clinical locations will be brought under one roof in the new MARC building, making it possible for patients to receive integrated care in a "one-stop shop."²⁴

In May 2009, UTHSCSA announced plans to construct a \$150 million South Texas Research Facility across from the new MARC building. The 200,000-square-foot research lab will be one of the largest research buildings ever built in San Antonio and should attract internationally renowned scientists to the city while creating high-paying jobs in the biomedical sector.²⁵ UTHSCSA is an integral part of the Alamo region's health care and bioscience community and is poised to continue playing a prominent role.



tumors in cancer patients and an investigation into treatments of inflammation.

Veterans' Health Care

The South Texas Veterans Health Care System (STVHCS) is one of six veteran health care systems in Texas. A veteran's health care system is defined as a full service health care provider, which includes hospitals, outpatient clinics, mental health services and rehabilitative services. The STVHCS is geographically the largest veteran's health care system in Texas, covering veterans in San Antonio and South Texas, which extends all the way to the border. STVHCS has a 268-bed facility in San Antonio providing primary, secondary and tertiary health care, surgery, psychiatry and rehabilitation medicine. It also includes a 90-bed Extended Care Therapy Center, a 30-bed Spinal Cord Injury Center, an eight-bed Bone Marrow Transplant Unit and a Geriatric Research, Education and Clinical Center also located in San Antonio.

In affiliation with the University of Texas Health Science Center at San Antonio, STVHCS offers an active ambulatory care (outpatient) program with satellite clinics in Corpus Christi, McAllen, San Antonio, Laredo, Harlingen and Victoria. STVHCS also contracts with local community health care providers to run clinics in Alice, Beeville, Eagle Pass, Kingsville, New Braunfels, San Marcos and Seguin that provide primary care to veterans close to their homes or work. STVHCS also operates veteran outreach centers in Corpus Christi, Laredo, McAllen and San Antonio that address the special needs of older veterans.²⁶

The STVHCS Kerrville Division (KD), located 65 miles northwest of San Antonio, began operations in 1947. It provides medical and long-term care services for an estimated 16,000 veterans residing in the Texas Hill Country. KD comprises 226 hospital beds and a 154-bed Nursing Home Care Unit. KD has developed an extensive primary-care delivery system and enjoys successful affiliations with Schreiner University and Howard College.²⁷

Psychiatric Care

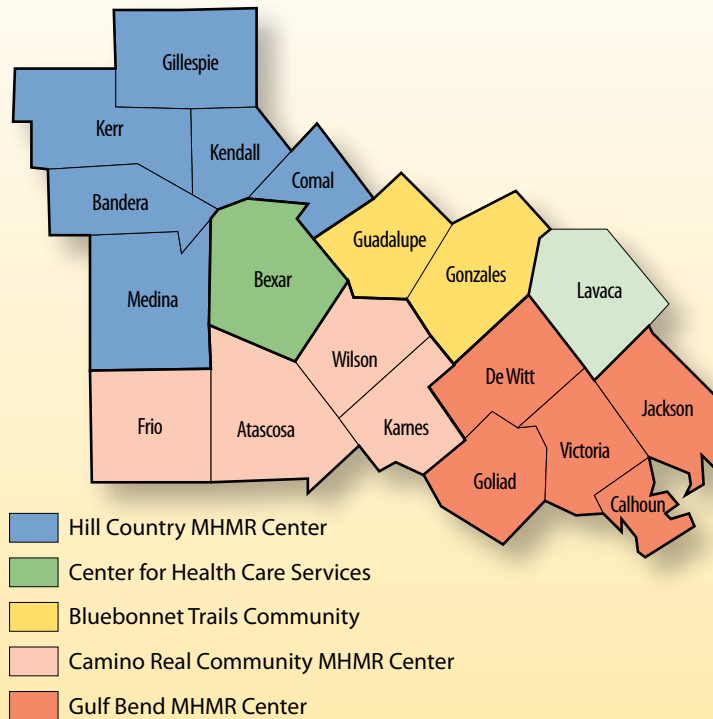
Like many other areas of the state, the Alamo area is experiencing a health professional shortage in its mental health workforce. Fortunately, San Antonio is designated as an Area Health Education Center (AHEC). AHECs were established by the U.S. Congress in 1971 to recruit and train health professionals in underserved communities. For example, students are provided information about mental health careers and provided community-based educational placements in mental health settings. The AHECs also help communities recruit and retain mental health professionals and mental health programs.²⁸

The region's psychiatric care is coordinated by a number of community mental health and mental retardation (MHMR) centers affiliated with the Texas Department of State Health Services (DSHS). In addition, the area has two state-administered inpatient crisis stabilization centers and long-term care facilities housed at the Kerrville and San Antonio state hospitals (**Exhibit 40**).

Community MHMR centers serve as the usual entry point for mental health treatment. These centers provide a number of services



Exhibit 40

Alamo Region, Community Mental Health and Mental Retardation (MHMR) Center Service Areas

Source: Texas Department of State Health Services.

that can be divided into two general categories: mental health assessment and referral and outpatient treatment and counseling. Each community MHMR center provides assessment and treatment services to both children and adults through interdisciplinary treatment teams that either refer clients to specialized service providers or develop treatment plans to serve their individual needs.

DSHS administers the Alamo region's two inpatient public psychiatric state hospitals, Kerrville State Hospital and San Antonio State Hospital. Both provide crisis stabilization and long-term psychiatric care but serve very different populations.

Kerrville State Hospital cares for persons with major mental illnesses who need the safety, structure and resources of an inpatient setting. Lengths of stays vary with the needs of each patient. The facility has 184 beds for patients hospitalized on a "forensic commitment," which results when an individual charged with a crime appears to be mentally ill and the court questions whether they are competent to stand trial for the offense.²⁹

San Antonio State Hospital provides intensive inpatient diagnostic treatment, rehabilitative and referral services for seriously mentally ill persons from South Texas, with a focus on low-income and indigent clients. Admission may be voluntary or involuntary depending on whether a court has determined that the patient is seriously mentally ill, dangerous to his or her self or others or dangerous if left untreated. The facility has 302 beds and 912 staff members.³⁰

In addition to these facilities, the region is home to the University Health System (UHS) psychiatric services program, which serves clients with a wide array of mental health disorders including bipolar spectrum disorder, schizophrenia and psychotic disorders, substance abuse behavior, anxiety and post-traumatic stress disorders (PTSD), childhood and adult attention deficit hyperactivity disorder (ADHD), personality disorders and suicidal or violent behaviors.

UHS psychiatric facilities include a psychiatric emergency services (PES) facility that provides around-the-clock emergency psychiatric services. The PES facility is South Texas' only dedicated psychiatric emergency room. Because UHS serves as the main



teaching hospital for UTHSCSA's medical professionals, the PES is staffed with experienced UTHSCSA faculty as well as psychiatry resident physicians, UTHSCSA students who have completed their course work and licensure but are completing their residency training. With about 400 visits monthly, many consider PES to be the "safety net" for psychiatric services in the San Antonio area.

All UHS outpatient psychiatric services are provided in collaboration with UTHSCSA's Department of Psychiatry. UHS provides a full spectrum of psychiatric care for children and adolescents, adults and geriatric and substance-abuse patients. It has clinics around the San Antonio metro area, each equipped to serve patients with an array of mental health conditions including anxiety and depression, bipolar disorder, dementia and cognitive disorders, ADHD, learning problems and developmental delays.³¹

Veterans' Psychiatric Care

The South Texas Veterans Health Care System offers veterans psychiatric assistance for conditions including PTSD, mood disorders, schizophrenia and substance abuse, through both inpatient and outpatient services. STVHCS' Audie L. Murphy Veterans Affairs (VA) Hospital provides inpatient crisis stabilization and short-term care through two 25-bed inpatient acute-care psychiatric units. It also has a 26-bed substance abuse rehabilitation program that provides an intensive detoxification program as well as a relapse prevention program. For veterans needing longer inpatient care, the Audie L. Murphy VA Hospital operates a 40 bed-domiciliary (a residential program) that provides

coordinated clinical care for veterans to help them achieve and maintain the highest level of independence possible.³²

STVHCS's Kerrville Division provides veteran mental health services including a mental health clinic with a psychiatrist, psychologist, nurse practitioner and social work therapists. KD can treat a full range of psychiatric disorders on an outpatient basis and often consults with clients' primary-care doctors during any hospitalizations. A psychologist is co-located in the KD's primary-care clinic areas to act as a liaison between primary-care providers and the mental health clinic. Similarly, KD has assigned a geropsychologist to its geriatric clinic to perform neuropsychology evaluations and to serve geriatric and demented patients, both in the hospital and as outpatients.³³

Children's Psychiatric Care

The Alamo region has several entities that serve children with mental health issues.

The Behavioral Health Clinic in the Goldsberry Children's Center of CHRISTUS Santa Rosa Children's Hospital is a joint venture of the hospital, UTHSCSA's Division of Child and Adolescent Psychiatry and the Child Guidance Center of San Antonio. It provides services to children suffering from mental health issues, specializing in ADHD, bipolar disorder, depression, anxiety and adjustment disorders. The clinic is run and staffed by child psychiatry faculty, child and adolescent psychiatry residents from UTHSCSA, psychologists and therapists from the Child Guidance Center and psychologists from the community.³⁴

The Child Guidance Center (CGC) of San Antonio is a nonprofit agency that provides

(text continued on Page 87)

The Child Guidance Center of San Antonio is a nonprofit agency that provides outpatient mental health care to Bexar County children and adolescents regardless of family income.



Military Medical Centers

Fort Sam Houston's Brooke Army Medical Center (BAMC) is a modern 1.5 million-square-foot, 450-bed health care facility that provides Level 1 trauma treatment and graduate medical education. BAMC is the Army's only certified Level 1 center, and one of only 15 hospitals in the U.S. that hold both Level 1 Trauma certification and accreditation from the American Burn Association.

BAMC's 58 outpatient specialty clinics in and around the San Antonio metro area serve military personnel, their dependents and veterans, recording an average of a million patient visits each year. BAMC also receives more than 4,000 emergency room visits each month.

The hospital also has more than 60 accredited educational programs, including 38 graduate medical education programs, eight nursing programs and 18 enlisted allied health and medic phase II (medical technician, radiology technician, etc.) training programs, as well as additional programs in administration and allied health specialties.

Forty beds are devoted to the Army Institute of Surgical Research, which operates the renowned Army Burn Center, the only such center run by the Department of Defense (DoD). The Burn Center has treated more than 800 military personnel injured in war. BAMC opened a second burn intensive care unit in December 2004 to accommodate increased patient care requirements. Since the global war on terrorism began in March 2003, the Burn Flight Team has made more than 85 trips to Landstuhl Army Regional Medical Center in Germany, transporting hundreds of burned and other critical-care patients to BAMC.

In January 2005, BAMC opened the DoD's second center for amputee care. To date, BAMC providers have cared for more than 280 service members who have sustained traumatic amputations. A multi-million dollar outpatient rehabilitation center called the "Center for the Intrepid" opened on Jan. 29, 2007. Adjacent to it are two new 21-room, handicapped-accessible Fisher Houses to house patients and their family members.³⁵

Wilford Hall Medical Center (WHMC) at Lackland Air Force Base is the Air Force's largest medical facility. WHMC provides complete medical care to military beneficiaries in the south-central U.S. as well as specialized care to patients from around the world. WHMC has about 16,000 inpatient admissions annually and more than 700,000 clinic visits.

The 2005 Base Realignment and Closure (BRAC) process recommended the consolidation of WHMC and BAMC in San Antonio into a single entity to be called the San Antonio Military Medical Center (SAMMC), with two integrated campuses. BRAC 2005 recommended that BAMC serve as a world-class health science center for inpatient and ambulatory care, with graduate medical education and training, a Level 1 trauma center and the Army Burn Center. This facility will be known as SAMMC-North. WHMC will serve as a large, full-service ambulatory care center with selected medical and surgical outpatient specialties including a comprehensive eye care center; the facility will be SAMMC-South.³⁶



outpatient mental health care to Bexar County children and adolescents regardless of family income. In 2008, CGC provided services to 2,178 children at locations throughout the county. CGC offers a full range of services including individual and family psychosocial assessments, psychiatric evaluations and medication management.³⁷

Laurel Ridge Treatment Center, a 196-bed facility located in San Antonio, is a psychiatric hospital that serves children, adolescents and adults. It offers crisis intervention, assessment and referral services 24 hours a day for all clients regardless of age. These services are often short in duration, lasting from three days to a month. Once patients are stabilized, they are moved to community-based outpatient services in their home areas. For children and adolescents requiring more lengthy stays, Laurel Ridge also offers residential treatment. Residential treatment usually lasts from three to 18 months, with the goal of ultimately moving clients to less-restrictive environments or to outpatient services in their home communities.³⁸

The Cyndi Taylor Krier Juvenile Correctional Treatment Center (CTKJCTC) provides services to youth who have been convicted of juvenile crimes in Bexar County. CTKJCTC houses up to 96 residents with average lengths of stay of approximately nine months. UTHSCSA's Division of Child and Adolescent Psychiatry provides psychiatric services to CTKJCTC. The program, part of the Bexar County Juvenile Probation Department, is structured to provide behavioral and educational services in a structured environment. It offers a self-paced educational program run by the East

Central Independent School District, as well as around-the-clock nursing staff.³⁹

Southwest Mental Health Center is a private, nonprofit children's hospital specializing in the treatment of mental, emotional and behavioral disorders. It serves children aged three through 17, offering acute inpatient care, residential care, day treatment care and outpatient care. The acute-care program is a short-term psychiatric hospital that focuses on stabilizing children or adolescents in crisis. The residential treatment program is also provided in a hospital setting, and provides 24-hour treatment for children and adolescents with chronic psychiatric disorders.⁴⁰

Professional Shortages and Rural Health Care

Health Professional Shortage Areas are designated by the U.S. Department of Health and Human Services as geographic areas or certain populations that have a significant shortage of available health care personnel. Seven counties in the Alamo region (Atascosa, Bandera, Goliad, Jackson, Karnes, Medina and Wilson) have health professional shortages. Atascosa, DeWitt, Frio, Goliad, and Medina are also considered to be dental health professional shortage areas.⁴¹ Bandera County has five direct primary-care physicians (physicians who have direct patient contacts and who cannot also be categorized as administrative staff or researchers) for a population of 21,032 residents; Karnes County has four direct primary-care physicians for 15,969 residents; and Goliad County has two for a population of 7,488.⁴²

In 2008, largely rural Frio and Medina counties expanded their mental health and



primary-care service offerings with a grant from the U.S. Department of Health and Human Services. The \$150,000 grant went to South Texas Rural Health Services, Inc., a pilot program started in 2006 to provide mental health, substance abuse and primary-care services to the medically underserved in these two counties. The funds are targeted for area residents who may be uninsured, underinsured or otherwise members of a vulnerable population.

To help further expand health care services to underserved areas in San Antonio, the pharmaceutical company Pfizer recently started a *promotores* initiative. *Promotores* are community health workers who provide a vital link between community health resources and patients in underserved areas. They also provide culturally sensitive information on health care to the Hispanic community. Through the Pfizer initiative, the drug company will train individuals to reach out to uninsured Hispanics and educate them on a Pfizer program that saves money on prescription drugs.⁴³

The Uninsured

Texas has the nation's highest share of residents who are uninsured. In the years 2006 and 2007, an average of 24.8 percent of all Texans lacked health insurance.⁴⁴ In 2005, the uninsured rate in the Alamo region was 25.9 percent.

In the region, the lowest rate was in Victoria County, with an estimated 21.3 percent of its residents uninsured, while the highest rate was in Bandera, with a 32.9 percent uninsured rate. The uninsured rate in Bexar County, the region's most populous county, was 24.6 percent in 2005.⁴⁵ The San Antonio

MSA had a slightly lower uninsured rate of 23.6 percent, but the rate was considerably higher among Hispanics (30.6 percent) and African Americans (27.0 percent).⁴⁶

Uninsured residents of the Alamo region typically receive care from a number of "safety-net" providers including hospital districts, public hospitals, other area hospitals, University of Texas Health Science Center facilities in San Antonio and community health clinics that provide low-cost or free medical care.

In Bexar County, the public hospital (the University Health System) cares for the uninsured through its hospital, neighborhood health centers and clinics. In 2008, the hospital collected about \$220 million in property taxes, but provided more than \$261 million in charity care. About 44 percent of UHS patients were uninsured in 2008.⁴⁷

In 1996, the growth in the uninsured population spurred UHS to establish CareLink, a financial assistance program for low-income Bexar county residents. Uninsured Bexar County residents who do not qualify for Medicaid, Medicare, veteran's benefits or the Children's Health Insurance Program (CHIP), and who meet income eligibility requirements, can become members of CareLink and obtain health care through UHS. While it is not an insurance program, CareLink members are offered a monthly payment plan based on their family size and income.⁴⁸ In 2008, 19 percent of UHS' paying clients were CareLink members.⁴⁹ One study of San Antonio's safety net noted that CareLink is one of the few ways the uninsured can access health care services at a lower cost.⁵⁰

In Bexar County, the public hospital (the University Health System) cares for the uninsured through its hospital, neighborhood health centers and clinics.



Faculty, residents and students at UTHSCSA also care for the uninsured through their School of Medicine's medical practice, UTHSCSA's Cancer Therapy and Research Center, CHRISTUS Santa Rosa Health Care, the South Texas Veterans Health Care System and other facilities. UTHSCSA provides more than \$100 million annually in uncompensated care to the uninsured and underinsured.⁵¹

In February 2005, UTHSCSA opened a student-run free clinic program at Alpha Home, a center for indigent women in need of medical care, and staffed it with medical students, residents and faculty volunteers.⁵² In 2007, medical students and faculty donated 1,800 hours of free medical care to serve about 750 women at Alpha Home. The center has established another student-run free clinic at San Antonio Metropolitan Ministries, which provides shelter and care for the homeless.⁵³

Moreover, each of the region's 19 counties operates a County Indigent Health Care Program (CIHCP) that provides medical services for eligible low-income individuals who do not qualify for other government programs such as CHIP, Medicaid or Medicare. Eligibility is based on income, the number of people in a household, financial resources and residence. In the Alamo region, some counties administer the CIHCP program while in others it is administered through a hospital district or public hospitals.⁵⁴

Another source of health care for low-income and uninsured people is the community health center (CHC), usually a private, nonprofit entity supported by faith-based organizations, civic leaders and local business

owners. A recent federal government study called CHCs America's primary-care safety net and noted that almost 40 percent of CHC patients are uninsured.⁵⁵

These health centers rely on funding from a variety of sources including federal grants and programs, state and local governments, patient payments and private donations. They are generally located in underserved areas, both urban and rural. In addition to primary care and laboratory services, CHC patients also receive preventive care. CHCs also may provide outreach, health education and screening programs as well as other social services tailored to meet the needs of their communities.

The National Association of Community Health Centers reports that every year, billions are spent on unnecessary and costly emergency room visits that could have been redirected to CHCs, which are more effective in providing primary care to the uninsured.⁵⁶ The federal government recently provided more funding for community health centers in its economic stimulus package. All five CHCs serving the Alamo region will receive stimulus funds.

Bexar County has two of the region's CHCs — El Centro del Barrio dba CentroMed and Barrio Comprehensive Family Health Care Center dba CommuniCare Health Centers — both established in the early 1970s. CommuniCare has two full-service health clinics providing medical care to 76 medically underserved census tracts in San Antonio. In 2008, these two clinics provided medical care to about 35,000 patients.⁵⁷ Over the next two years, CommuniCare expects to receive \$1.3 million in

In 2007, medical students and faculty donated 1,800 hours of free medical care to serve about 750 women at Alpha Home.



The Alamo region has higher rates of adult obesity and diabetes than Texas as a whole.

federal stimulus funding to expand its health services.⁵⁸

CentroMed provides primary health care, behavioral health services, nutritional and other support services through 20 sites in San Antonio and Bexar County. Six of its primary-care health clinics are located in or near seven homeless shelters. CentroMed also operates the Lanier Student Health Clinic, which provides medical, dental and psychiatric care to students enrolled in one of 14 public schools as well as their families.⁵⁹

Several other counties in the Alamo region also have CHCs. The Community Health Centers of South Central Texas provides primary health services to residents of Gonzales County and has service sites in the cities of Gonzales, Seguin and elsewhere. South Texas Rural Health Services serves Frio County residents with clinics in Pearsall and Dilley among others. The Atascosa Health Center has a primary health care clinic in Pleasanton that also provides services to residents of Atascosa County.

Diabetes and Obesity

The Alamo region has higher rates of adult obesity and diabetes than Texas as a whole. UHS System in San Antonio notes that diabetes is a major concern in Bexar County.⁶⁰ The prevalence of adult diabetes in Texas is rising rapidly, from 7.7 percent in 2004 to 9.7 percent in 2008.⁶¹ In the Alamo region, the prevalence of diabetes also rose, from 9.9 percent in 2005 to 11.4 percent in 2008.⁶² During the same period, the prevalence of overweight and obesity in Texas grew from 62.9 percent in 2004 to 66.2 percent in 2008.⁶³

Obesity is a major risk factor for diabetes, a serious public health problem.⁶⁴ In 2008, 68 percent of San Antonio MSA adults were overweight and obese, compared to 66.2 percent in the rest of Texas.⁶⁵ Hispanics, which make up 50.5 percent of the Alamo region population, have higher rates of obesity and diabetes than Anglos.⁶⁶ A 2005 study noted that by the 1990s, three out of four Mexican-American adults were either overweight or obese.⁶⁷

Diabetes was the sixth most common cause of death in Texas from 2002 through 2005.⁶⁸ The statewide diabetes mortality rate in 2005 was 30 deaths per 100,000 persons. In the Alamo region, the diabetes mortality rate for 2001 through 2005 was 36.9 deaths per persons, and considerably higher for Hispanics and African Americans — 62.2 per 100,000 and 51.9 per 100,000, respectively. Mortality from diabetes, furthermore, is probably higher than indicated in statistics, since it is often listed as a contributing factor rather than a cause of death.⁶⁹

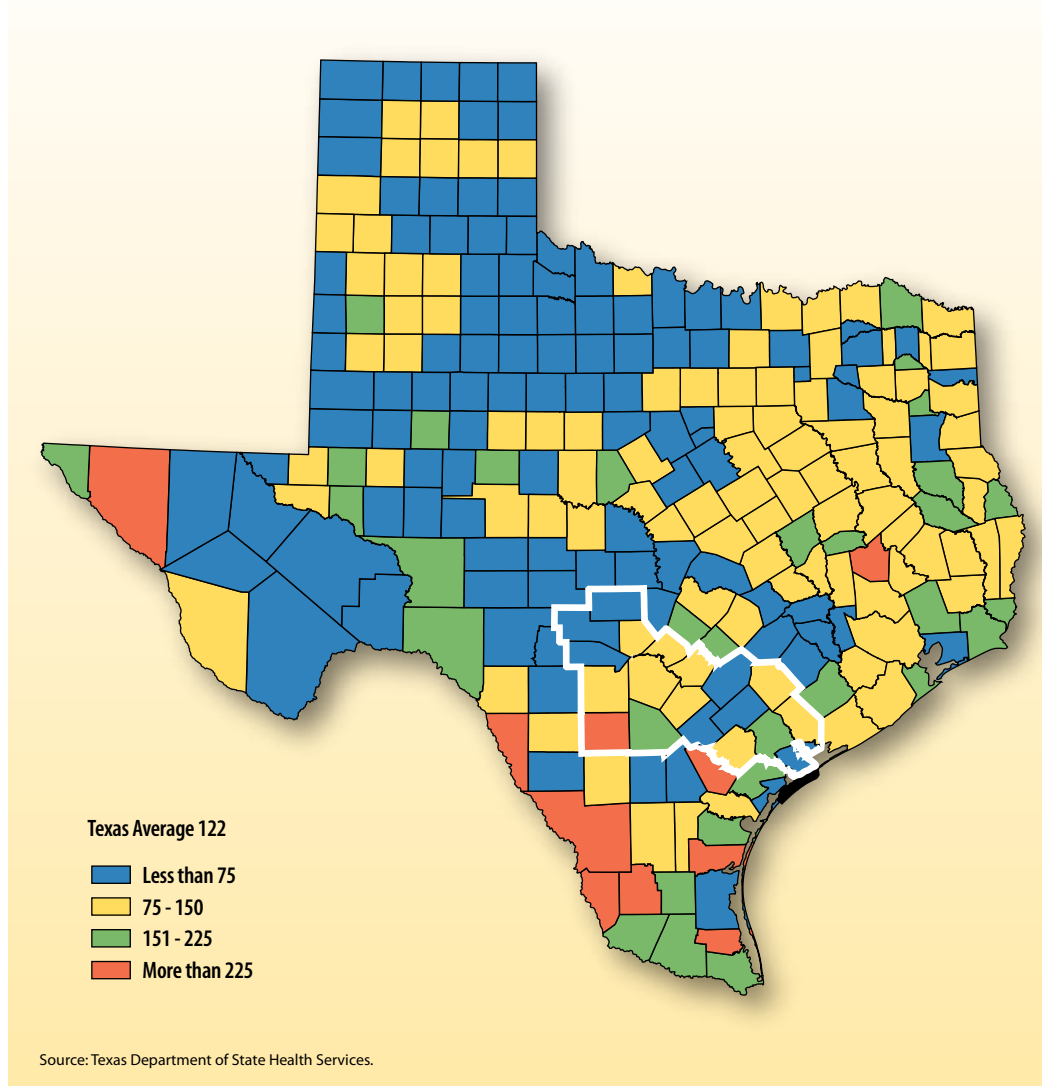
Untreated or poorly controlled diabetes can lead to long-term health complications including heart disease, stroke, vascular disease, blindness, kidney disease, nerve damage and amputation. Texas hospital data indicate that five — Frio, Atascosa, Victoria, Jackson, and Bexar — of the Alamo region's 19 counties have a higher-than-average number of admissions per 100,000 residents for long-term diabetes complications (**Exhibit 41**). In 2005, the state average for such admissions was 122 per 100,000 residents.⁷⁰

The region is home to the Texas Diabetes Institute (TDI) in west San Antonio. In 1993, the University Health System, Bexar



Exhibit 41

Admissions for Diabetes-Related Long-Term Complications per 100,000 Population, by Texas County, 2005



County's public hospital, worked with the UT Health Science Center and the Texas Diabetes Council, a division of DSHS, to establish TDI, which provides diabetes-related services to communities in South Texas and throughout the state. Housed in UHS's University Center for Community Health, TDI is committed to diabetes

prevention through patient education, treatment and research.

In May 2008, San Antonio became the second city in the country (after New York City) to establish a diabetes registry to monitor cases in the city. The San Antonio Metropolitan Health District (SAMHD) initiated the effort, which was included in the



city's legislative agenda and approved by the 2007 Texas Legislature. A diabetes registry pilot program began in May 2008 and will last for 18 months. Information from about 50,000 active diabetic patients and four major testing labs will be collected to produce summary reports at the regional, community, provider and practice levels. SAMHD will use these data to monitor the diabetes epidemic and to aid efforts to improve the health of diabetes patients.⁷¹

Local organizations in the region are joining the fight against obesity and diabetes. The Bexar County Health Collaborative, whose members include Baptist Health System, Steve Blanchard, the Bexar County Department of Community Investment, CHRISTUS Santa Rosa Health Care, Methodist Health Care System, Community First Health Plans, UHS, Methodist Healthcare Ministries of South Texas, SAMHD, WellMed and the YMCA of Greater San Antonio, are working together to improve the health status of the community. Among their priority issues is obesity prevention, especially among youth.⁷²

In 1999, the Health Collaborative created Fit City, a program covering several initiatives to improve the health and wellness of residents of San Antonio and the surrounding community. The YMCA of Greater San Antonio now manages and operates the program, which encourages individuals to eat properly and exercise. Some of the initiatives are designed for all ages — Walk San Antonio, Healthy Vending, Body Mass Index and a newsletter.⁷³

Another program of the Health Collaborative is Project Measure Up, designed to

decrease the prevalence of childhood obesity that can lead to Type 2 diabetes. Program volunteers have assisted Bexar County's school districts in implementing Senate Bill 530 passed in 2007, which requires daily exercise for children through grade six and annual fitness assessments for children in grades three through 12. Studies have found that children who are overweight at age 12 are 75 percent more likely than others to be overweight as an adult.⁷⁴ Diabetes rates are substantially higher among sedentary people than those who are active.⁷⁵

The U.S. Agency for Health Care Research and Quality has lauded San Antonio's Bienestar Health Program, a school-based program designed to teach students in elementary and middle school to eat properly and exercise, as innovative and effective. A San Antonio physician, Dr. Roberto Trevino, Executive Director of the Social and Health Research Center (SHRC), a non-profit diabetes and obesity prevention program, provided the impetus for the Bienestar program that is a collaborative effort between SHRC, the University of Texas at San Antonio and Texas State University. Private companies and foundations also provide funding and support for the program.

Bienestar was implemented in 1995 and by 2007 was in place in more than 300 schools within various South Texas school districts, mostly in low-income San Antonio and Laredo neighborhoods.⁷⁶ Preliminary results of a study evaluating the program's success in 10 elementary and four middle schools in South San Antonio ISD found that both diabetes and obesity rates declined among participating students.⁷⁷

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Stonehenge II

Kerr County is home to one of two Stonehenge replicas in Texas. (The other is in Odessa.) Located off of FM 1340 near Hunt, the replica sits on private property held by the family of the late builder, Alfred Sheppard. Known as Stonehenge II, highway travelers are often surprised to see this homage to ancient English civilization as they pass by. All are invited to visit the free attraction, provided they respect the area and keep it free of litter.

The idea began in 1989, when neighbor Doug Hill gave Sheppard a spare piece of limestone left over from Hill's patio construction. Having visited Stonehenge in England, Sheppard stood the rock upright in his yard, and soon commissioned Hill to help replicate the ancient site using plaster mounted on steel and mesh frames cemented into the ground. As the replica ages, it appears more like the original, although it is somewhat smaller.

Sheppard's tribute to ancient stone structures extends beyond Stonehenge. Flanking the structure is a pair of 13-foot replicas of Easter Island Moai, the stone busts that made the island famous. The replica Moai were constructed with the same material as Stonehenge II, also with the help of Doug Hill.⁷⁸

Alamo Region, Dance Halls

The Alamo region is home to several historic dance halls. Gruene Hall, Luckenbach Dancehall and Floore's Country Store have been entertaining patrons throughout the southern Hill Country for many years.

Located in southeastern Gillespie County, Luckenbach was founded by German settlers in 1849. By the late 1800s, a dance hall had joined the town's other simple buildings. The hall was rebuilt in the 1930s with a maple-wood dance floor. Many popular musicians have played in the town and written about it. Willie Nelson hosted his annual "picnic" concerts in the town until 1999. Waylon Jennings' famous song "Back to the Basics of Love" features the town. Jerry Jeff Walker famously recorded his breakout album *Viva Terlingua* in Luckenbach in 1973. The building continues to function as a dance hall and musicians still travel to the famous town.

Floore's Country Store in Helotes, built by John T. Floore in 1946, has a dance hall that has been the site of many concerts by famous musicians. It houses a restaurant famous for its tamales that opens to a stage surrounded by picnic tables, with room for thousands. Floore passed away in 1975 but left a continuing musical legacy. Willie Nelson played the dance hall every Saturday night for many years. Jack Ingram first played there in 1994 and held the rehearsal dinner for his wedding there in 1996. The store is under new management and has seen new renovations that added outside bars and new picnic tables while retaining the original, laid-back atmosphere.

In 1878, Henry Gruene built Gruene Hall to provide the small town with family-friendly entertainment. In the early 1900s, the hall held dances every Saturday night and offered a sandwich and coffee break at midnight to sustain the guests until closing time at 5 AM. In the 1970s, Cheryle Fuller led a successful campaign to designate the hall as a historical landmark. George Strait played the hall regularly through the 1970s and 1980s, as did Kris Kristofferson, Lyle Lovett, Robert Earl Keen, Jr., Jerry Jeff Walker, Stevie Ray Vaughan, Jerry Lee Lewis and others.⁷⁹



Summer Camps along the Guadalupe River

There are a number of summer camps in the Alamo region. Located in Hunt along the Guadalupe River, Rio Vista camp for boys and Sierra Vista camp for girls offer a number of amenities and activities including waterskiing, sailing and horseback riding.

Heart O' the Hills is a summer camp for girls located in Hunt along the Guadalupe. Switching to a camp from a family resort in 1953, the camp features a number of activities including target sports, field sports and fine arts. The camp also features special seminar days for non-traditional activities including basket weaving and glass blowing.

Camp Mystic, established in 1926, is another camp specifically for girls located along the Guadalupe. All cabins at Mystic are roomy and comfortable and come with indoor bathrooms. Campers are split into two tribes, the Kiowas and the Tonkawas, to foster a sense of belonging when they arrive. Campers are also assigned big sisters and little sisters to further strengthen relationships within the community.

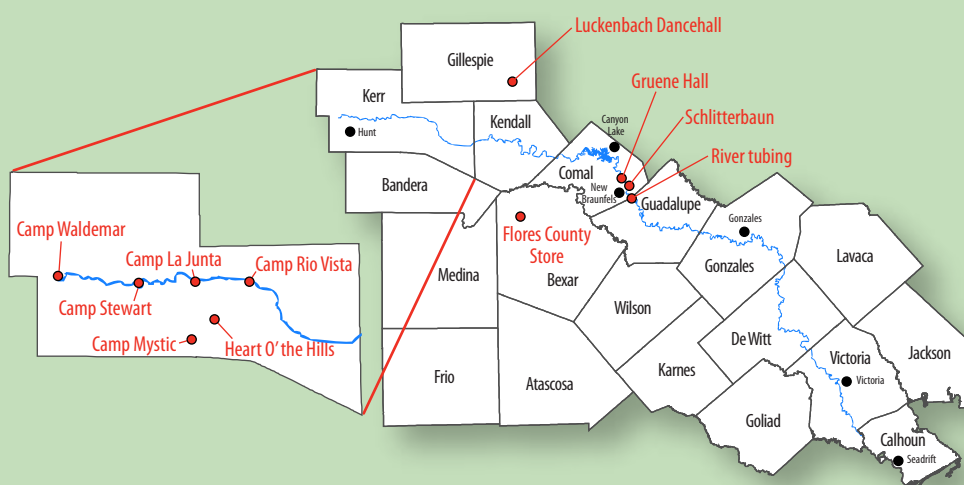
Camp La Junta is a camp for boys age 7-14 located in Hunt. La Junta is a Native American word meaning "the meeting place," and the camp exists to offer campers a chance to escape city life and participate in a number of outdoor activities including horseback riding and archery. The camp also features a unique mountain biking program where campers learn about equipment, safety and bicycle maintenance.

Camp Waldemar, established in 1926, is an all-girl Christian camp featuring equestrian activities. Campers stay in *kampongs*, cabins on stilts that house six to eight campers at a time. The camp's facilities also can be used for outside events including retreats and weddings. Camp Waldemar hosts a dance with nearby Camp Stewart boys camp at the end of each term.

Camp Stewart features a variety of activities including riflery, swimming, archery and tennis. Its riflery program includes the Stewart Rifle Range, a 50-foot range near the edge of camp, as well as expert instruction and a National Rifle Association affiliation allowing campers to earn marksmanship rankings. The camp also features a chorus and a band.

According to the American Camp Association, rates for summer camp participation in the Texas and Deep South region average \$376 a week. The median estimated revenues for camps in the Association's southern region including Texas were \$560,000 in 2006, the last year in which this information is widely available. Total wages for camp employment in the region were \$7.8 million in 2008, up from \$7.1 million in 2007.⁸⁰

Alamo Region Attractions



Source: Texas Comptroller of Public Accounts.



Festivals

Known for its tourist sites and rich culture, the Alamo region hosts several annual festivals that support its economy. Fiesta San Antonio is an 11-day event that takes place each April about 15 minutes from downtown. The event began in 1891, to commemorate heroes of the Alamo and the battle of San Jacinto, and now attracts more than 3 million visitors annually. It features more than 100 events, including parades, a carnival, an oyster bake, a car show, a women's soccer tournament, art exhibits and traditional music, and has an estimated annual economic impact of more than \$280 million.⁸¹

Thirty miles south of San Antonio, the Poteet Strawberry Festival attracts more than 100,000 visitors each April, making it the largest agricultural festival in Texas. The festival holds a rodeo as well as strawberry judging and eating contests. The three-day festival also draws performers ranging from hypnotists and magicians to Tejano and country music groups. Each year, the festival adds \$10 to 12 million to the local economy and awards scholarships to local high school seniors.⁸²

Just northwest of San Antonio, the town of Helotes hosts a festival called Cornyval in early May that pays tribute to the town's Spanish namesake, corn. The festival, which began as a fundraiser for local nonprofits, has continued for more than 40 years. In addition to food and corn-related contests, the Cornyval features rodeo performances, a carnival and amusement park, craft booths, live music and Civil War reenactments.⁸³

The Kerrville Folk Festival is held south of Kerrville on the Quiet Valley Ranch campgrounds for 18 days each May and June. Since 1972, the festival has presented more than 1,500 singer-songwriters, ranging from Willie Nelson to up-and-coming acts from across the country. Campers have more opportunities to socialize with musicians and other guests, with impromptu nightly concerts around campsites. The festival also features songwriting "schools," music business seminars, Hill Country bike rides, canoe trips and children's concerts and activities. The grounds also host Kerrville's three-day Wine and Music Festival each Labor Day weekend, with a similar format that instead focuses on wine.⁸⁴

Each June, the Institute of Texan Cultures in San Antonio hosts the three-day Texas Folk Life Festival. Modeled after the Smithsonian Folk Life Festival, the event brings more than 40 ethnic and cultural groups together to share customs and traditions. Groups perform musical and dance shows, as well as food and craft demonstrations.⁸⁵

Since 1938, the town of Floresville to the southeast of San Antonio has hosted a peanut festival each October. The festival honors the area's traditional cash crop with family activities such as the "goober games," a parade, street dances, food and music. Goober game activities include peanut sack races, face painting and peanut tossing. The festival elects a royal court of 10 local high school seniors who each receive scholarships from the Peanut Festival Association.⁸⁶

Wurstfest is held in New Braunfels each November, lasting 10 days. The festival celebrates the town's German heritage with traditional polka music, sausage in a variety of styles, German pastries and deserts, turkey legs and beer. Since its 1961 inception, the festival has grown in size and national recognition, and now attracts more than 100,000 visitors annually. Although food and entertainment remain the focal point, other events take place all over New Braunfels during the festival, such as arts and crafts shows, boating regattas, tours of historic German buildings and the Tour de Gruene bicycle race.⁸⁷

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Education

Education is the foundation for future economic growth. The fast pace of technological change dictates that the local population adapt and attain the skills necessary to attract and retain a wide array of employers and a diverse industrial mix. A well-educated and highly skilled work force is essential for successful competition in the global economy.

Public Education

About 9.4 percent, or more than 435,000 of the state's public elementary and secondary students, attend school in the Alamo

region, which is home to 76 public school districts with 730 campuses, as well as 27 charter districts and their 56 campuses.

The region's student population has risen steadily in recent years, growing by 12.7 percent from 2001-02 to the 2007-08 school year, for a net gain of nearly 49,000 students. The region's total population rose by 12.4 percent over the same time period.

During 2007-08, the region's largest independent school districts by enrollment were Northside ISD in Bexar County, with almost 86,000 students, and North East ISD, also in Bexar County, with nearly 62,000 students. The smallest districts were the Guardian Angel Performance Arts Academy in Bexar County, a charter school with just seven students, and Divide ISD in Kerr County, with 15 students.

About 9.4 percent, or more than 435,000 of the state's public elementary and secondary students, attend school in the Alamo region.



University of Houston-Victoria

PHOTO: University of Houston-Victoria



Alamo Academic Academies

San Antonio has made a commitment to ensure that its economy will be driven by high-wage, high-skill industries. The Alamo Academies are intended to provide “talent pipelines” that prepare high school juniors and seniors for post-secondary education and the work force through industry-driven dual-credit programs.

The Alamo Academies provide two-year training and internship programs designed to give participating high school students a seamless transition to college or the work force. Three specialized academies offer free college-level training in aerospace, information technology and security and manufacturing.

Students may enter into paid internships and earn more than \$2,500 working for companies such as Lockheed Martin, Boeing, Kinetic Concepts, Cox Manufacturing, AT&T and Rackspace Managed Hosting. In addition, academy students can earn anywhere from 27 to 31 college credit hours while completing their high school diplomas. Academy graduates earn an average of nearly \$22,000 in salary and another \$6,500 in benefits directly upon graduating.

The Alamo Academies are the culmination of a partnership including the city of San Antonio, the Alamo Community College District, Alamo Worksource, the San Antonio Manufacturers Association, Port San Antonio, the Greater San Antonio Chamber of Commerce, local universities and other stakeholders. This partnership was created to supply the skilled talent that local industries need while allowing students to earn college credit and learn about occupations that require some college education.¹

Like the rest of the state, the Alamo region has seen its public school population become more Hispanic (**Exhibit 42**). But the region has a much larger share of Hispanic students than the state as a whole, at 61.4 percent versus 47.2 percent.²

The Alamo region also has seen an increase in its number of economically disadvantaged students. In 2001-02, more than 216,000 of its students, or 56 percent of total enrollment

were identified as economically disadvantaged. In 2007-08, more than 249,000 students or 57.3 percent of the region’s students were classified in this way, slightly more than the statewide average of 55.3 percent.

Accountability

The Alamo region’s districts compared favorably with statewide averages in the 2007-08 district accountability ratings established by the Texas Education Agency (TEA). The region exceeded the state average for Exemplary ratings, and fell below the statewide average for districts deemed Academically Unacceptable (**Exhibit 43**).

In August 2008, TEA rated six of the region’s 103 districts as Exemplary; 25 as Recognized; 68 as Academically Acceptable; and two as Academically Unacceptable. Two districts were not rated.

The Alamo region also exceeded statewide averages in its number of campuses rated

Exhibit 42

Alamo Region, Ethnicity of Public School Students, 2001-02 and 2007-08 School Years

Ethnicity	2001-02	2007-08
White	33.5%	28.8%
Hispanic	57.9	61.4
Black	7.3	7.7
Asian/Pacific Islander	1.2	1.7
Native American	0.2	0.3

Totals may not equal 100 percent due to rounding.
Source: Texas Education Agency.



Academically Acceptable (**Exhibit 44**). A smaller percentage of its campuses were rated Academically Unacceptable than in the state as a whole.

Of the 786 campuses in the region's districts, including charter schools, 83 were rated Exemplary; 252 were rated Recognized; 342 were Academically Acceptable; nine were Academically Unacceptable; and 100 were listed as "Not Rated: Other" in 2007-08.

Twenty of the region's 27 charter districts were rated Academically Acceptable, while three were rated as Recognized and one as Exemplary. One charter district campus was rated Academically Unacceptable and two were "Not Rated: Other" in 2007-08.

In 2008, among the region's districts that teach all grade levels, Falls City ISD in Karnes County had the highest percentage of students passing all Texas Assessment of Knowledge and Skills (TAKS) tests, at 96 percent. Randolph Field ISD in Bexar County had the next largest share, at 91 percent. (An average for the Alamo region is unavailable because TEA reports district data only as percentages.)

Within the region, all graduating students in the Charlotte and Runge ISDs took college entrance exams in the 2007-08 school year, greatly outpacing the statewide average of 68.2 percent. Of the 82 Alamo region districts for which data are available, 23 had participation rates above the state average.

In 2007-08, Alamo Heights ISD had the highest percentage of test takers scoring at or above the criterion score used by TEA to measure college readiness, at 55.6 percent. Across the state, just 27 percent of students who took at least one of the tests scored at or above the criterion score.

Exhibit 43

2007-08 Accountability Ratings, Alamo School Districts

Rating	Region	Statewide
Exemplary	5.8%	3.5%
Recognized	24.3	26.8
Academically Acceptable	66.0	66.6
Academically Unacceptable	1.9	2.6
Not Rated: Other	1.9	0.6

Note: "Not Rated: Other" includes campuses such as alternative education programs or early childhood education centers. These data include charter districts. Totals may not equal 100 percent due to rounding.
Source: Texas Education Agency.

Exhibit 44

2007-08 Accountability Ratings, Alamo School Campuses

Rating	Region	Statewide
Exemplary	10.6%	12.2%
Recognized	32.1	34.4
Academically Acceptable	43.5	42.8
Academically Unacceptable	1.1	2.5
Not Rated: Other	12.7	8.1

Note: "Not Rated: Other" includes campuses such as alternative education programs or early childhood education centers. These data include charter districts.
Source: Texas Education Agency.

In the 2006-07 school year, the most recent year for which dropout data is available, the Alamo region had a dropout rate of 4.2 percent, which was slightly higher than the statewide average of 3.9 percent.

Outcomes

In 2008, 81 percent of Alamo region residents above the age of 25 had a high school diploma, a General Educational Development (GED) certificate or some higher education, slightly above the statewide average of 75.7 percent.³

In the 2006-07 school year, 22,919 students graduated from the region's public high



San Antonio Public Library Central Branch

The 106 year-old San Antonio Public Library system (SAPL) consists of 24 libraries and two bookmobiles serving Bexar County's 1.6 million population with more than 2.1 million items. Two more branch libraries now under construction will open in 2010.⁴

The star of SAPL is its Central Branch, in the heart of downtown at the corner of Soledad and Navarro. This six-story structure of Mexican Modernist design is a bold departure from traditional library architecture and has changed the look of the city. The Central Branch, at 240,000 square feet, is twice as large as the old main library and contains almost 500,000 items. Designed by the famous Mexican architect Ricardo Legorreta, the exterior is a striking red and features a bright yellow atrium, outdoor plazas, sculptures and fountains, and is adorned inside and out with purple, blue, yellow and geometric shapes. Much of the interior furnishings were made specifically for this location, such as the "castle" in the children's area.⁵

The facility was financed through a bond approved by San Antonio voters in 1989 and another \$10 million raised by private donations and city allocations. Construction began in July 1993; the Central Branch opened on May 20, 1995, to crowds so large that tickets had to be issued specifying times for library tours. The San Antonio mayor at the time, Nelson Wolff, called it "the most important building in San Antonio in 50 years."⁶

The library has computers distributed on each floor with an advanced online catalog and web site and laptop hookups with Internet connections. For disabled patrons, the library has a Kurzweil Reading Machine and zoom-text computer. Facilities include an auditorium, art gallery, media center, reading and conference rooms and numerous service desks for help with questions and borrowing materials. Outside the library near the circular driveway entrance is the Java Nook coffee shop, where patrons can enjoy a pastry and a latte. A bookstore in the basement, operated by the Friends of San Antonio Public Library, sells withdrawn materials and extra donated books.⁷

The Central Library has tripled the number of visitors who visited the old downtown location, and currently averages 3,000 per day. With the recent economic downturn, SAPL is being used even more as a free place to search for a job on the Internet, check e-mail, take an Excel class and study for a high school equivalency diploma or civil service exam. SAPL is also a place to borrow DVDs, entertain children at story time, find lost relatives using the genealogy or Texana collections, stroll in the art gallery, buy great \$1 books, and read the latest bestseller in Spanish or Chinese.⁸

SAPL's central and branch libraries share 1.7 million books, 121,000 audio items, 127,000 videos, 325 e-books and 1,200 current subscriptions, as well as 352 computers that are used by 822,000 registered users and 4.1 million visitors each year. Librarians guide users to credible Web sites and 109 online databases not available for free on the Internet. Each year, SAPL staff members answer 3.2 million questions and check out 6 million items. SAPL also offers 8,000 programs and classes each year to all age groups.⁹

schools, representing about 9.5 percent of the statewide total for that year. Northside ISD had the largest number of graduates with 4,300, while the Academy of Careers and Technologies in Bexar County and Nordheim ISD in DeWitt County had the smallest number, with just three graduates each.

About 7 percent of the region's students graduated under the state's most stringent graduation plan, the Distinguished Achievement plan; 69.1 percent under the Recommended plan, which is the required plan; and 23.8 percent under the Minimum plan, a less stringent graduation plan that requires



both parental and school approval, or under an Individual Education Plan offered through Special Education (**Exhibit 45**).

School Finance

In the 2007-08 school year, the Alamo region's total school spending per pupil, including debt service, averaged \$10,750, about 5.8 percent more than the statewide average of \$10,162. Twenty Alamo region districts spent more than 20 percent above the statewide average in that year. Another 59 districts, however, including the region's charters, spent less per pupil than the statewide average.

Excluding charter districts and districts located on military bases, which do not receive funding from local taxes, the region's lowest total tax rate in 2007 was that of Divide ISD, at 74.3 cents per \$100 of property value. Floresville ISD levied the highest rate at \$1.52. The statewide average was \$1.19 per \$100 of value, and in the region 39 districts exceeded it.

The Alamo region generated a substantially lower share of its school revenue from local taxes (40.8 percent) than the statewide average (45.8 percent). Hunt ISD received the largest portion of its school funding from local taxes (75 percent), while Edgewood ISD had the lowest share (11.3 percent). The region's share of revenue from other local sources, such as equity transfers and tuition, was marginally lower than the state's, at 6.5 versus 6.7 percent. The KIPP Aspire Academy gained 35.4 percent of its revenue from these other local sources, for the highest share in the region; Doss Consolidated School District received the lowest share

Exhibit 45

Alamo Region and Statewide, 2007 High School Graduates

Graduation Plan	Region	Statewide
Distinguished Achievement	7.0%	10.8%
Recommended	69.1	67.0
Minimum/IEP*	23.8	22.1
Distinguished Achievement & Recommended as Percent of Total	76.1%	77.9%

Totals may not equal 100 percent due to rounding.
Source: Texas Education Agency.

for the region's non-charter schools, at 1.2 percent.

Edgewood ISD had the lowest property wealth per pupil in 2007, at \$75,178, while Divide ISD led the region with \$3,155,900 per pupil. The regional average was \$294,401, or 11.7 percent lower than the statewide average of \$333,420.

The Texas school finance system requires districts with relatively high property wealth per pupil to share it with less-wealthy districts through a process called "equity transfers." In 2007, 12 districts in the Alamo region transferred roughly \$73.3 million, an average of \$176 per pupil. Calhoun County ISD transferred the largest total amount (\$26.9 million), while Ezzell ISD had the highest per-pupil transfer (\$15,938).

Among the non-charter districts, Poteet ISD received the largest share of revenue from the state in 2007, at 71.5 percent. Hunt ISD received the smallest state share, at 9.4 percent. The regional average for 2007-08 was 41.8 percent, higher than the statewide average of 37.8 percent. The region derived a slightly larger share of its school funding from federal aid than the statewide average, at 11 percent versus 9.8 percent statewide.¹⁰

The Alamo region generated a substantially lower share of its school revenue from local taxes (40.8 percent) than the statewide average (45.8 percent).

Teachers

In examining teacher salaries across the region, it should be remembered that average salaries vary with length of teacher tenure as well as wage levels. District A, for instance, may have a higher average salary than District B because it has a higher percentage of experienced teachers, even though its wage levels for various years of experience are lower than District B's.

The average Alamo region teacher salary in 2007-08 was \$983 above the statewide average of \$46,178. Divide ISD had the highest average salary at \$57,869.

Average salaries in the region rose by 14.5 percent from 2002-03 to 2007-08,

compared with a statewide average rise of 15.5 percent for the same period. For charter schools, the San Antonio Can High School had the highest increase for this period at 53 percent. Divide ISD had the highest increase for non-charter schools at 30.3 percent.

The region's teacher salaries accounted for more than 26 percent of total district expenditures from all funds in 2007-08, lower than the statewide average of 30.1 percent. Lighthouse Charter School devoted the highest share of total spending to teacher salaries, at 45.2 percent. Moulton ISD spent the highest share among the non-charter schools, at 42.2 percent. Sixty of the region's districts devoted a smaller share of expenditures to teacher salaries than the statewide average.

In 2007-08, the Alamo region had a slightly higher number of students per teacher, at 15 versus a statewide average of 14.7. For charter schools, the Guardian Angel Performance Arts Academy had the lowest number of students per teacher, at 4.7. For non-charter schools, Nordheim ISD had the lowest ratio, at 5.6 students per teacher.¹¹

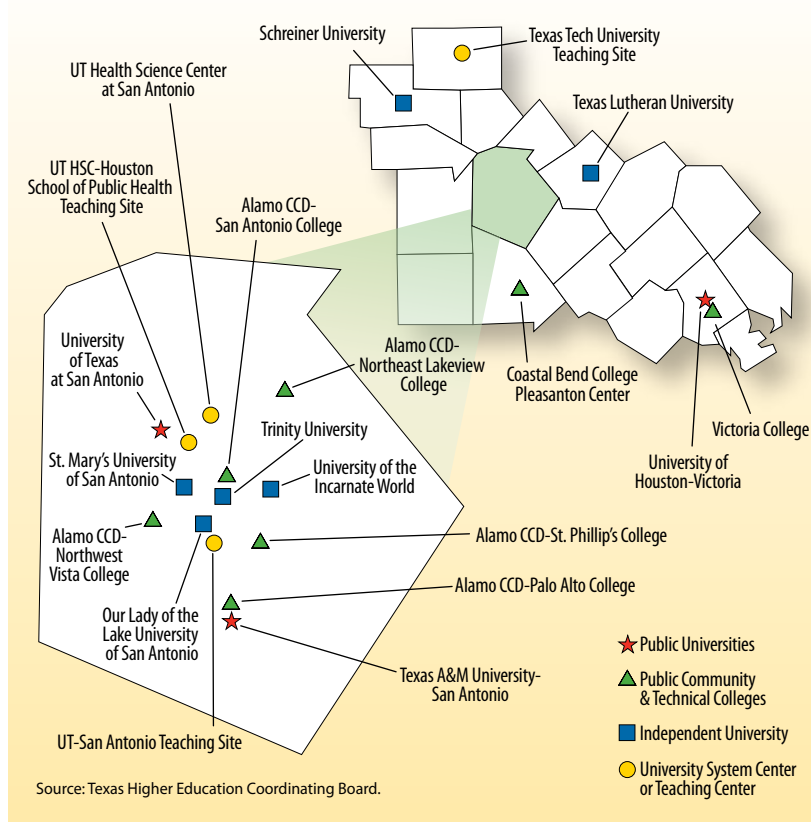
Higher Education

The Alamo region has 16 institutions of higher education, including three university teaching sites and a health science center. Ten of these institutions are in Bexar County; this includes Texas A&M University-San Antonio, which became a stand-alone university in 2009. Six of the region's 19 counties have higher education campuses or facilities (**Exhibit 46**).¹²

(text continued on Page 109)

Exhibit 46

Alamo Region, Higher Education Campuses





Museums in the Alamo Region

The Witte Museum celebrates South Texas by collecting, preserving and displaying wonders of natural science, history and art. The museum is located at the third entrance to Brackenridge Park on the banks of the scenic San Antonio River.

In 1921, Alfred G. Witte, a local businessman, left \$65,000 to the city for the building of a museum. Since its opening in 1926, the Witte has expanded its services by building two log cabins and moving and restoring three historic homes and an art studio to the grounds. In addition to its many galleries, the museum has an amphitheater, a courtyard with native gardens, a museum store, two auditoriums and the H-E-B Science Treehouse.¹³

The Witte has permanent natural exhibits including dinosaur bones and South Texas wildlife scenes with live insects, birds, and fish. It also includes Indian, vaquero and cowboy artifacts, an ancient mummy, historical gowns and early Texas furniture.¹⁴

Starting with a \$7,200 annual budget in October 1926, this cultural institution has blossomed into an almost \$6 million annual operation with about 4,500 annual dues paying members. The majority of the Witte's funds are raised through private contributions, with 9 percent coming from city funds. In 2008, about 400,000 people visited the museum, including 161,500 children, with 60,000 obtaining free admission through organization sponsorships on Free Tuesdays. The museum has 50 full-time and 40 part-time employees and about 175 volunteers, in addition to 40 voting trustees. The Witte works with college interns who gain valuable experience in museum studies, art, history, education and business. The museum also trains area teachers in history and science, offers summer and overnight camps for youngsters and provides daily demonstrations and presentations to visitors.¹⁵

Because of its beauty and central location, many events are held at the Witte, such as weddings, business meetings, concerts, plays and birthday parties. The two auditoriums in the main building have a combined 4,225 square feet with stages and audiovisual capabilities. The larger Prassel Auditorium also has a kitchen, a dance floor and an adjoining veranda and courtyard than can house up to 1,200 people. Children of all ages enjoy the Science Treehouse, a four-story, 15,000-square-foot building with hands-on science exhibits and a great roof top view of the San Antonio River and Brackenridge Park.¹⁶

To complement the ongoing expansion of the Riverwalk into Brackenridge Park, the Witte Museum is planning to expand its facilities by more than 65,000 square feet by 2012, with a new South Texas Heritage Center, a new grand entry, a Center for Rivers and Aquifers, and a uniquely designed restaurant that will honor the history of the museum's Reptile Garden. The renovation of the Pioneer Hall next door to the Witte will house their South Texas Heritage Collection.¹⁷

Fredericksburg's National Museum of the Pacific War is the only museum in the continental United States dedicated to the story of World War II's Pacific theater. This institution includes the Plaza of Presidents, Veterans' Walk of Honor, the George H.W. Bush Gallery, the Admiral Nimitz Museum, a Pacific Combat Zone exhibit, the Nimitz Education and Research Center and the Japanese Garden of Peace. The museum was originally named after Fleet Admiral Chester Nimitz, who was born in Fredericksburg. Originally housed in the historic Nimitz Hotel, the museum continues to expand, with an additional 43,000 square feet to be added by December 2009. In 2008, this museum had about 96,400 visitors.¹⁸

Kerrville's Museum of Western Art collects, preserves and promotes art and artifacts related to cowboys, Native Americans, settlers and the landscape of the American West. Opened in 2004, the museum is housed in a 14,000-square-foot timber and limestone hacienda designed by famed architect O'Neil Ford. On display are some of the finest modern-day Western paintings and sculpture as well as works by esteemed masters of the past. The museum's Masel S. Quinn Pavilion, completed in 2004, houses an art education program. In 2008, the museum had about 17,500 visitors.¹⁹



Museums in the Alamo Region (cont.)

Founded in 1854, Fort Sam Houston is the ninth-oldest U.S. Army installation. The Fort Sam Houston Museum collects, displays and preserves the rich artifacts of the U.S. Army in South Texas. It houses artillery, vehicles, firearms, photographs, manuals, uniforms, insignia and other Army materials used in every major international conflict since the Civil War. The museum also helps preserve more than 900 national historic landmark buildings, the largest number of any active military post. Theodore Roosevelt, John J. Pershing and Dwight D. Eisenhower are just a few of the historic figures that served at Fort Sam. The Army museum had about 15,000 visitors in 2008.²⁰

Alamo Region Museums

County	City	Museums
Atascosa	Pleasanton	Longhorn Museum
Bandera	Bandera	Frontier Times Museum
Bexar	Brooks City Base	U.S. Air Force Museum of Aerospace Medicine
Bexar	Fort Sam Houston	Fort Sam Houston Museum; U.S. Army Medical Department Museum
Bexar	Lackland Air Force Base	U.S. Air Force History and Traditions Museum; U.S. Air Force Security Police Museum
Bexar	San Antonio	Briscoe Western Art Museum; Institute of Texan Cultures; Instituto Cultural de Mexico; McNay Art Museum; Museo Alameda; San Antonio (SA) Art League Museum; SA Children's Museum; SA Museum of Art; Texas Air Museum; Texas Highway Patrol Museum; Texas Transportation Museum; Witte Museum
Calhoun	Port Lavaca	Calhoun County Museum
Comal	New Braunfels	McKenna Children's Museum; Museum of Texas Handmade Furniture; New Braunfels Museum of Art & Music; Railroad Museum; Sophienburg Museum
DeWitt	Cuero	Chisholm Trail Heritage Museum; DeWitt County Historical Museum
DeWitt	Yorktown	Yorktown Historical Museum
Frio	Pearsall	Old Frio County Jail Museum
Gillespie	Fredericksburg	National Museum of the Pacific War, Pioneer Museum, Vereins Kirche Museum
Goliad	Goliad	Old Market House Museum
Gonzales	Gonzales	Gonzales Memorial Museum; Old Jail Museum
Guadalupe	Seguin	Fiedler Memorial Museum; Seguin-Guadalupe County Heritage Museum
Jackson	Edna	Texana Museum
Karnes	Helena	Karnes County Museum
Kendall	Boerne	Agricultural Heritage Center & Museum
Kerr	Kerrville	Hill Country Museum; Museum of Western Art
Lavaca	Hallettsville	Lavaca Historical Museum
Medina	Hondo	Medina County Museum
Victoria	Victoria	McNamara House Museum; Museum of the Coastal Bend; Nave Museum
Wilson	Floresville	Jailhouse Museum

Sources: Texas Almanac, 2008-2009, MuseumsUSA.org, and individual museum Web sites.



Museums in the Alamo Region (cont.)

The Air Force History and Traditions Museum on Lackland Air Force Base (AFB) is the largest of its kind. The museum offers a history of basic military training from before World War I to Operation Iraqi Freedom, with exhibits on the history of aviation, weapons, uniforms and thousands of other objects. Recently, the mission of the museum has expanded to include the San Antonio Aviation Cadet Center, in operation from 1942 to 1946, the Kelly AFB Air Depot from 1917 to 1960, and officer training programs conducted from 1948 to 1993. In 2008, this museum had about 10,100 visitors.²¹

The neo-classic Nave Museum in Victoria was built as a memorial to impressionist painter Royston Nave, and commissioned by his wife after his death in 1931. The Nave paintings are primarily of the people and landscapes of Texas, and are shown only every few years so that the museum can host traveling art exhibits. In 2008, almost 8,000 people visited including 4,000 students from the area as part of the Victoria Regional Museum Association art education program.²²

The Old Jail in Gonzales, completed in 1887, housed prisoners until 1975. The three-story concrete and steel structure was designed to hold 200 inmates in high security. Its architecture illustrates the early history of corrections, with cells for condemned prisoners featuring two-inch-thick iron doors; rooms for lunatics and women; and a dungeon that admits air and light only from holes above the doors. In 1975, the building was converted into a museum that displays items from prisoners and information about law enforcement in South Texas. In 2008, the Old Jail had about 5,400 visitors.²³

The Gonzales Memorial Museum and Amphitheatre was built to honor the Texas Centennial in 1936 and 1937. A large reflecting pool and the "Immortal 32" monument tell the story of 32 men from Gonzales that defended the Alamo. The museum also houses the "Come and Take It" cannon, which may have fired the first shot in the war for Texas independence on October 2, 1835. The back wall of the 500-seat amphitheatre features a marble mural honoring the 18 men who defended Gonzales from Mexican troops in 1835. Area documents and relics in the museum date from 1660. In 2008, this landmark had about 3,500 visitors.²⁴

These campuses include five operated by the Alamo Community College District, called the Alamo Colleges (**Exhibit 47**).

Enrollment

In fall 2008, 108,057 students enrolled in the Alamo region's higher public and private universities and colleges. Enrollment in four-year universities and colleges accounted for 45.7 percent of the total, with another 51.5 percent enrolled in the region's community colleges. The remaining 3,060 students were at the University of Texas Health Science Center at San Antonio.

The University of Texas at San Antonio (UTSA) had 28,413 students enrolled in fall 2008, while 3,174 enrolled at the University of Houston-Victoria (UHV). UTSA's enrollment has risen by 50.9 percent since fall 2000. Enrollment at UHV jumped by 86.9 percent in the same period, due in large part to expanded program offerings at off-campus locations as well as online. Both greatly exceeded the statewide public university enrollment growth rate of 22.8 percent.

The region's enrollment in two-year higher education programs rose from 42,823 in 2000 to 55,617 in 2008, a 29.9 percent

Since fall 2000, the University of Texas at San Antonio's enrollment has risen by 50.9 percent, and the University of Houston-Victoria's has increased by 86.9 percent.



increase. That pace lagged somewhat behind the statewide two-year enrollment growth rate of 38.2 percent.

In all, the region's higher education enrollment increased by 31.7 percent (**Exhibit 48**).²⁵

Accessibility

The University of Texas at San Antonio accepted 82.6 percent of its first-time undergraduate applicants for the fall 2008 semester, more than the statewide average of 74.4 percent. About 13.7 percent of the 10,949 applicants accepted at UTSA were accepted

because they were in the top 10 percent of their high school graduating class, compared to 21.8 percent of accepted applicants statewide.²⁶ The University of Houston-Victoria's acceptance rates are not reported separately to the Texas Higher Education Coordinating Board.

Outcomes

Because some degrees require more than four years of study, and because some students may need more time to graduate,

(text continued on Page 112)

Exhibit 47

Alamo Region, Higher Education Campuses

Institution	City	County
Coastal Bend College Pleasanton Center	Pleasanton	Atascosa
Alamo Colleges (Alamo CCD) –	San Antonio	Bexar
Northeast Lakeview College		
Northwest Vista College		
Palo Alto College		
St. Philip's College		
San Antonio College		
Our Lady of the Lake University of San Antonio	San Antonio	Bexar
St. Mary's University of San Antonio	San Antonio	Bexar
Texas A&M University-San Antonio (formerly TAMU-Kingsville System Center at Palo Alto)	San Antonio	Bexar
The University of Texas at San Antonio	San Antonio	Bexar
The University of Texas at San Antonio Teaching Site	San Antonio	Bexar
The University of Texas Health Science Center at San Antonio	San Antonio	Bexar
Trinity University	San Antonio	Bexar
University of the Incarnate Word	San Antonio	Bexar
UTHSC at Houston School of Public Health Teaching Site	San Antonio	Bexar
Texas Tech University Teaching Site	Fredericksburg	Gillespie
Texas Lutheran University	Seguin	Guadalupe
Schreiner University	Kerrville	Kerr
University of Houston-Victoria	Victoria	Victoria
Victoria College, The	Victoria	Victoria

Source: Texas Higher Education Coordinating Board.



Exhibit 48

Alamo Region, Fall Headcount Enrollment 2000 and 2008

Public Institutions	Fall 2000 Enrollment	Fall 2008 Enrollment	Enrollment Change	Percent Change
The University of Texas at San Antonio	18,830	28,413	9,583	50.9%
University of Houston-Victoria	1,698	3,174	1,476	86.9
Regional Total – Public Universities	20,528	31,587	11,059	53.9%
Statewide Total – Public Universities	414,626	509,136	94,510	22.8%
Alamo Colleges (Alamo CCD)	38,802	51,641	12,839	33.1%
The Victoria College	4,021	3,976	-45	-1.1
Regional Total – Two-year Public Colleges	42,823	55,617	12,794	29.9%
Statewide Total – Two-year Public Colleges	431,934	597,146	165,212	38.2%

Private Institutions	Fall 2000 Enrollment	Fall 2008 Enrollment	Enrollment Change	Percent Change
Our Lady of the Lake University of San Antonio	3,474	2,642	-832	-23.9%
St. Mary's University of San Antonio	4,137	3,868	-269	-6.5
Schreiner University	776	974	198	25.5
Texas Lutheran University	1,460	1,432	-28	-1.9
Trinity University	2,620	2,588	-32	-1.2
University of the Incarnate Word	3,702	6,289	2,587	69.9
Regional Total – Private Universities	16,169	17,793	1,624	10.0%
Statewide Total – Private Universities	107,681	115,048	7,367	6.8%

Health-Related Institutions	Fall 2000 Enrollment	Fall 2008 Enrollment	Enrollment Change	Percent Change
UT Health Science Center at San Antonio	2,543	3,060	517	20.3%
Regional Total – Health-Related Institutions	2,543	3,060	517	20.3%
Statewide Total – Health-Related Institutions	12,607	17,692	5,085	40.3%

	Fall 2000 Enrollment	Fall 2008 Enrollment	Enrollment Change	Percent Change
Regional Total 2-Year Institutions	42,823	55,617	12,794	29.9%
Regional Total 4-Year Institutions	36,697	49,380	12,683	34.6%
Regional Total Higher Education	82,063	108,057	25,994	31.7%

Note: Regional data do not include enrollment for branch campuses located in the Alamo region that are part of a main campus located in another region, since they are not reported separately to the Texas Higher Education Coordinating Board.

Separate data for Texas A&M-San Antonio is not included because it was part of Texas A&M University-Kingsville until 2009.

Source: Texas Higher Education Coordinating Board.



Exhibit 49

**Alamo Region Public Universities , Four- and Six-Year Graduation Rates
(First-Time, Full-Time, Degree-Seeking Students)**

Institution	Fiscal 1999 4-year	Fiscal 1999 6-year	Fiscal 2007 4-year	Fiscal 2007 6-year
University of Texas at San Antonio	7.2%	35.1%	14.2%	40.3%
Statewide Average	18.0%	49.2%	25.3%	56.3%

Source: Texas Higher Education Coordinating Board.

**The University of
Houston-Victoria**

The University of Houston-Victoria (UHV) has been an upper-division and graduate school since its beginning in 1973. In 2009, however, the Texas Legislature granted UHV the opportunity to admit freshman, starting in 2010. Students will then be able to earn their entire bachelor's degree at UHV and — pending final approval from the Southern Association of Colleges and Universities — some will be able to do so in only three years.

In a first-of-its-kind program at a Texas public university, the Degree-in-Three program is geared towards dedicated students who will take summer classes to complete their core courses in the first year before concentrating on their majors during the next two school years. Not all UHV degrees will be offered in this accelerated timeframe, which is modeled on many European programs. Although students obtaining a bachelor's degree in three years will pay the same tuition as those attending for four years, due to credit-hour requirements, they will save a year's worth of housing and other costs. And they'll be able to move into a career a year earlier, another valuable benefit.²⁷

the Texas Higher Education Coordinating Board (THECB) compares four-year and six-year graduation rates to measure university outcomes. Graduation rates improved significantly between fiscal 1999 and fiscal 2007 at UTSA, with its four-year rate nearly doubling and the six-year rate rising by 5.2 percent (**Exhibit 49**).

Because many community college students go on to a university to obtain a four-year degree, THECB also compares three-year and six-year graduation rates to measure community college outcomes.

The Alamo Colleges' three- and six-year graduation rates from fiscal 2000 to fiscal 2007 rose slightly, by 1.7 percent and 5.2 percent, respectively. These rates, however, still lag behind the statewide averages. The Victoria College's three- and six-year graduation rates, by contrast, were much higher than statewide averages in both 2000 and 2007. Its three- and six-year graduation rates fell between 2000 and 2007, however, by 5.6 percent and 17.1 percent respectively (**Exhibit 50**).

From fiscal 2000 to 2008, UTSA's number of degrees awarded rose by nearly 48 percent, to 4,591, while the University of Houston-Victoria, with a much smaller student body, doubled its number of degrees awarded. The statewide average increase was 35 percent (**Exhibit 51**).



Over the same period, the number of degrees and certificates awarded by all Texas community colleges rose by 49.2 percent.

In the Alamo region, The Victoria College, with nearly unchanged enrollment, increased its numbers of degrees and certificates awarded by 3 percent. The Alamo Colleges saw a sharp increase in degrees awarded; at 92.8 percent, their results

nearly doubled the statewide growth rate (**Exhibit 52**).²⁸

Affordability

From 2002-03 to 2008-09, the estimated costs of resident tuition and fees at both public universities in the Alamo region rose sharply, as they generally did statewide. The increase in costs for resident students, however, was not

Exhibit 50

Alamo Region Community Colleges, Three- and Six-Year Graduation Rates, (First-time, Full-time, Credential-Seeking Students),

Institution	Fiscal 2000 3-year	Fiscal 2000 6-year	Fiscal 2007 3-year	Fiscal 2007 6-year
Alamo Colleges (Alamo CCD)	4.2%	15.3%	5.9%	20.5%
The Victoria College	30.3	61.4	24.7	44.3
Statewide Average	10.8%	25.7%	11.1%	30.8%

Source: Texas Higher Education Coordinating Board.

Exhibit 51

Alamo Region Public Universities, Degrees Awarded, Fiscal 2000 and 2008

Institution	Fiscal 2000	Fiscal 2008	Change	Percent Change
University of Texas at San Antonio	3,107	4,591	1,484	47.8%
University of Houston-Victoria	351	704	353	100.6
Statewide Total	78,954	106,582	27,628	35.0%

Source: Texas Higher Education Coordinating Board.

Exhibit 52

Alamo Region Two-Year Colleges, Degrees and Certificates Awarded, Fiscal 2000 and 2008

Institution	Fiscal 2000	Fiscal 2008	Change	Percent Change
Alamo Colleges (Alamo CCD)	1,938	3,736	1,798	92.8%
The Victoria College	461	475	14	3.0
Statewide	37,395	55,809	18,414	49.2%

Source: Texas Higher Education Coordinating Board.



quite as steep at UHV and was higher than average at UTSA. The Alamo region universities' percent increase in total costs was within less than five percentage points on either side of the state average (**Exhibit 53**).

At the community college level, tuition and fees at the region's schools rose between 2002-03 and 2008-09, but less than the \$675 statewide average cost hike. The total resident student cost for the 2008-09

Exhibit 53

Alamo Region, College Costs

Public Universities

Institution	Resident Tuition and Fees 2002-03	Resident Tuition and Fees 2008-09	Dollar Change 2002-03 to 2008-09	Percent Change 2002-03 to 2008-09	Resident Total Costs 2002-03	Resident Total Costs 2008-09	Percent Change 2002-03 to 2008-09
University of Texas at San Antonio	\$3,598	\$7,666	\$4,068	113.1%	\$14,520	\$21,096	45.3%
University of Houston-Victoria	2,835	5,220	2,385	84.1	13,035	17,816	36.7
Statewide Average	\$3,441	\$6,193	\$2,752	80.0%	\$13,047	\$18,389	40.9%

Public Community Colleges

Institution	Resident Tuition and Fees 2002-03	Resident Tuition and Fees 2008-09	Dollar Change 2002-03 to 2008-09	Percent Change 2002-03 to 2008-09	Resident Total Costs 2002-03	Resident Total Costs 2008-09	Percent Change 2002-03 to 2008-09
Alamo Colleges (Alamo CCD)	\$1,173	\$1,832	\$659	56.2%	\$11,636	\$15,038	29.2%
The Victoria College	996	1,618	622	62.4	7,174	12,270	71.0
Statewide Average	\$1,120	\$1,795	\$675	60.3%	\$9,248	\$12,510	35.3%

Private Institutions

Institution	Resident Tuition and Fees 2002-03	Resident Tuition and Fees 2008-09	Dollar Change 2002-03 to 2008-09	Percent Change 2002-03 to 2008-09	Resident Total Costs 2002-03	Resident Total Costs 2008-09	Percent Change 2002-03 to 2008-09
Our Lady of the Lake University of San Antonio	\$12,964	\$20,232	\$7,268	56.1%	\$21,510	\$27,732	28.9%
St. Mary's University of San Antonio	13,480	21,156	7,676	56.9	21,615	30,000	38.8
Schreiner University	12,318	17,992	5,674	46.1	23,998	27,802	15.9
Texas Lutheran University	16,925	20,970	4,045	23.9	22,535	29,810	32.3
Trinity University	16,554	26,834	10,280	62.1	23,672	34,752	46.8
University of the Incarnate Word	13,498	20,260	6,762	50.1	21,648	29,380	35.7
Statewide Average	\$11,190	\$18,625	\$7,435	66.4%	\$19,434	\$29,859	53.6%

Note: Resident total costs include tuition and fees, books and supplies, room and board, transportation and personal expenses. Separate data for Texas A&M-San Antonio is not included because it was part of Texas A&M University-Kingsville until 2009. Source: Texas Higher Education Coordinating Board.



academic year was about the same at The Victoria College as for the average Texas community college; the Alamo Colleges' total costs were higher than the statewide average, although their tuition and fees were about average.²⁹

The cost of the region's private universities has varied somewhat in comparison to the statewide average. For 2002-03, estimated tuition and fee costs for the region's private universities were higher than the statewide average and, except at Schreiner University, this was also true in 2008-09. Total costs for a resident student in 2008, however, were lower or roughly the same as the state average, except at Trinity University.³⁰

Funding

The statewide average for public universities' total revenue, including tuition and fees, general revenue appropriations, federal funds and institutional funds, rose by 15.6 percent from fiscal 2006 to fiscal 2008. In the Alamo region, both public universities saw larger rates of increase in revenues, with UHV's increase more than half again as high at 24.8 percent. UTSA saw its revenues grow by 20.5 percent during the same period (**Exhibit 54**).³¹

Total state appropriations for community colleges fell in the 2004-05 biennium, as they did for the Alamo region's community colleges. By the 2008-09 biennium, however, statewide community college appropriations,

Institute of Texan Cultures

Located near the San Antonio Riverwalk on UTSA's HemisFair Park campus, the Institute of Texan Cultures serves as the state's ethnic and cultural heritage center. The institute features exhibits, programs, special events, a library and an extensive photo gallery, as well as teacher workshops and school outreach programs. It also holds annual festivals, including the Texas Folklife Festival during the summer and the Asian Festival held near the Chinese New Year.

The institute maintains a fresh feel by mixing temporary exhibits with permanent ones. Among the permanent exhibits is *Texans One and All*, which highlights the stories and customs of more than 20 cultural groups that settled in Texas. At the exhibit, guests can learn about Wendish wedding customs, Czech polka dancing and Japanese American internment camps, hear stories from early black Texans and see how early Swedish settlers lived.

Another permanent exhibit, *Creation and Cosmos*, offers a unique look at Native American spirituality over the last 1,000 years. Set in dark caves, the exhibit has artifacts such as decorated food and beverage containers used to communicate social standing, religious beliefs, political affiliations, cosmology and worldviews. The institute also gives an interactive look at life for early Texas settlers in its *Living Texas* exhibit. Guests can talk with ranch hands cooking a meal, watch seamstresses quilt or make thread on a wheel and peer inside an Indian tipi.

Other educational features at the institute include a hands-on outdoor learning center called the Back 40, which provides a cross-section of typical 19th century Texas, with a one-room schoolhouse, a log cabin, a barn, an army fort barracks and an adobe house. Knowledgeable instructors dressed in costume lead students and other groups through the Back 40.³²



Exhibit 54

Alamo Region, Public Universities Total Revenue Sources, Fiscal 2006 and Fiscal 2008

University of Texas at San Antonio

Revenue Source	Fiscal 2006	Fiscal 2008	Percent Increase
Tuition and fees	\$110,609,769	\$138,738,892	25.4%
State appropriations	108,073,695	126,224,393	16.8
Federal funds	60,454,600	64,492,971	6.7
Institutional funds	20,717,983	31,972,518	54.3
Total Revenue	\$299,856,047	\$361,428,774	20.5%

University of Houston-Victoria

Revenue Source	Fiscal 2006	Fiscal 2008	Percent Increase
Tuition and fees	\$7,118,295	\$10,456,539	46.9%
State appropriations	14,436,939	19,751,198	36.8
Federal funds	1,727,346	2,280,124	32.0
Institutional funds	10,361,542	9,494,679	-8.4
Total Revenue	\$33,644,122	\$41,982,540	24.8%

Statewide

Revenue Source	Fiscal 2006	Fiscal 2008	Percent Increase
Tuition and fees	\$2,000,693,293	\$2,400,749,604	20.0%
State appropriations	2,599,091,546	2,949,486,914	13.5
Federal funds	1,161,122,338	1,260,930,090	8.6
Institutional funds	1,375,219,819	1,638,009,659	19.1
Total Revenue	\$7,136,126,996	\$8,249,176,267	15.6%

Source: Texas Higher Education Coordinating Board.

Contact hours at the Alamo Colleges reflected their increased enrollment, with a 34.1 percent growth rate.

and the Alamo Colleges' amount, had recovered the loss. The Victoria College, however, did not have a similar rebound in its appropriations, and from 2002-03 to 2008-09 the college saw a 12.1 percent decrease in state general revenue funding (**Exhibit 55**).³³

Contact hours — the time a professor actually spends in the classroom with students — for community, state and technical colleges rose by 25.5 percent statewide from fall 2000 to fall 2008. In the Alamo region, contact hours

at the Alamo Colleges reflected their increased enrollment, with a 34.1 percent growth rate. The Victoria College had a drop in contact hours over the period (**Exhibit 56**).³⁴

Educational achievement will play a vital and positive role in the Alamo region's economic future. Significant increases in enrollment at the majority of the region's colleges and universities will place new demands on the region's higher education infrastructure, requiring more instructors to keep pace with student needs.



Exhibit 55

**Alamo Region, General Revenue Appropriations,
Public Community and Technical Colleges, Fiscal 2002-2009**

Institution	2002-03 Biennium	2004-05 Biennium	2006-07 Biennium	2008-09 Biennium	Percent Change 2002- 03 to 2008-09
Alamo Colleges (Alamo CCD)	\$120,311,432	\$115,564,930	\$130,737,272	\$135,693,392	12.8%
The Victoria College	15,166,180	13,690,643	13,618,232	13,328,426	-12.1
Public Community & Technical College Statewide Total	\$1,709,158,821	\$1,622,914,188	\$1,763,151,222	\$1,845,292,200	8.0%

Source: Texas Higher Education Coordinating Board.

Exhibit 56

**Alamo Region, Community, State and Technical Colleges,
Contact Hours Fall 2000 and Fall 2008**

Institution	Fall 2000	Fall 2008	Percent Change 2000 to 2007
Alamo Colleges (Alamo CCD)	6,142,544	8,239,264	34.1%
The Victoria College	707,248	643,792	-9.0
Public Community & Technical College Statewide Total	73,370,630	92,048,303	25.5%

Note: Contact hours include only those with a full or part-time faculty instructing by lecture, lab or practicum. Classes taught at an inter-institutional location are excluded.

Source: Texas Higher Education Coordinating Board.

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Conclusion

The outlook for the Alamo region is promising. Its educational opportunities and tourism industry should buttress its economic growth, as will its vibrant health care sector.

The region's employment should rise by 23 percent between 2003 and 2013, despite the current national downturn. Educational and health services should lead all industries with a 44 percent increase in employment, and the construction sector should add jobs each year as well, boosting employment by 38 percent from 2003 to 2013. The financial sector, trade, transportation and utilities, the leisure and hospitality industry, agriculture, natural resources and mining also should increase employment.

The region's two main trade corridors, Interstate Highway 35 and Interstate Highway 10, will continue to make San Antonio a critical trade center, boosting the entire region's economy. With its state parks, historical monuments, water parks and other attractions, the region will remain a popular tourist destination.

One out of seven San Antonio employees are employed in health care and biosciences. San Antonio's 900 acre South Texas Medical Center employs about 25,000 people. Brooke Army Medical Center's Army Burn

Center and Center for the Intrepid will continue to provide trauma care and rehabilitation services to injured military personnel.

About 9.4 percent of the state's public elementary and secondary students attend school in the Alamo region. The region's educational offerings remain strong, with 86.2 percent of its campuses rated Academically Acceptable or above.

The Alamo region's 16 institutions of higher education will help to prepare the region's work force of tomorrow. The University of Texas at San Antonio and University of Houston at Victoria are both increasing enrollment much faster than the state average for such institutions.

The Comptroller's office is ready to help the Alamo region meet its challenges with economic information and analysis. For assistance, please e-mail the Comptroller's Local Government Assistance and Economic Development Division at local.govt@cpa.state.tx.us, or call toll-free at 1-800-531-5441, ext. 3-4679.

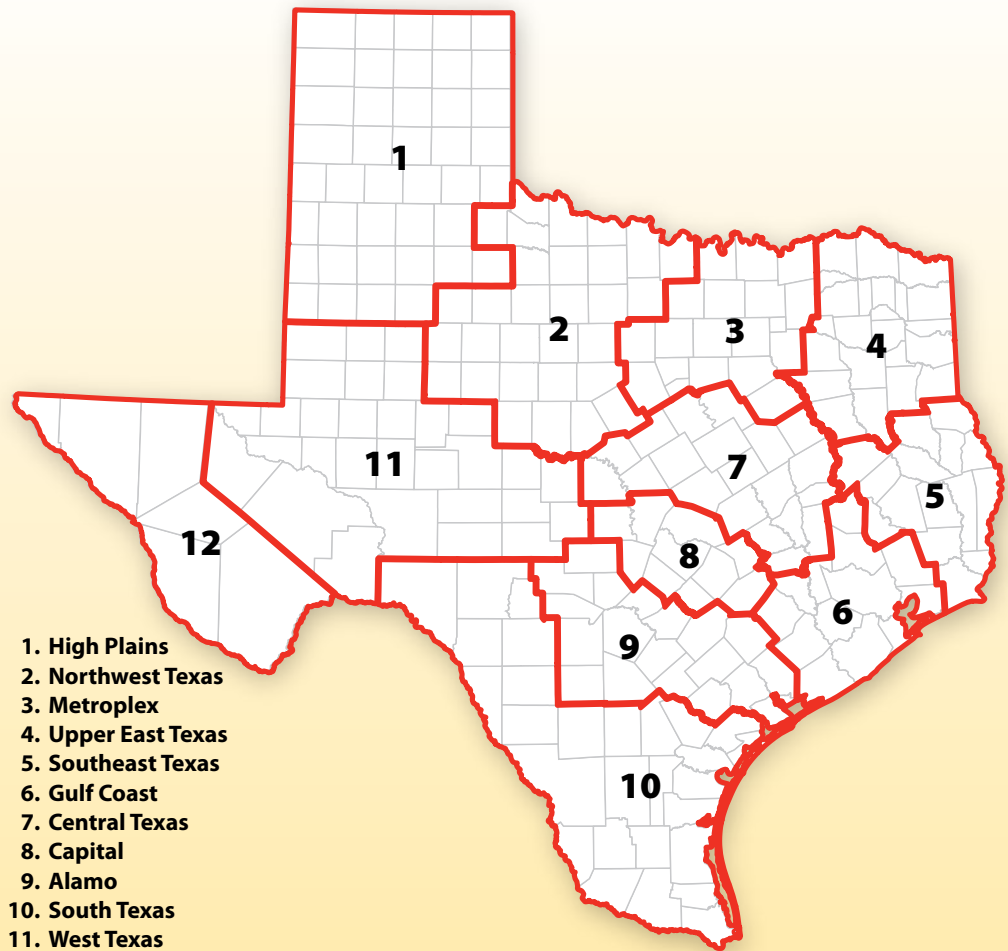
Contact information for local government assistance is also available on the TexasAhead Web site at www.texasahead.org/lga.

We will continue to provide local and state leaders with detailed information in this continuing series. We hope you look forward to future volumes in this series, which will continue to highlight each of the state's 12 economic regions (**Exhibit 57**).



Exhibit 57

Map of Economic Regions



Source: Texas Comptroller of Public Accounts.